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Form 990

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2020

Open to Public Inspection

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

Do not enter social security numbers on this form as it may be made public.

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

A For the 2020 calendar year, or tax year beginning 07-01-2020 , and ending 06-30-2021

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
Avera Health

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
3900 West Avera Drive No 300

City or town, state or province, country, and ZIP or foreign postal code
Sioux Falls, SD 57108

F Name and address of principal officer:
Bob Sutton
3900 West Avera Drive No 300
Sioux Falls, SD 57108

D Employer identification number
46-0422673

E Telephone number
(605) 322-7300

G Gross receipts \$ 325,452,539

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

J Website: ▶ www.avera.org

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

L Year of formation: 1998

M State of legal domicile: SD

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities:
Promotion of Health

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)

4 Number of independent voting members of the governing body (Part VI, line 1b)

5 Total number of individuals employed in calendar year 2020 (Part V, line 2a)

6 Total number of volunteers (estimate if necessary)

7a Total unrelated business revenue from Part VIII, column (C), line 12

7b Net unrelated business taxable income from Form 990-T, line 39

Revenue

8 Contributions and grants (Part VIII, line 1h)

9 Program service revenue (Part VIII, line 2g)

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)

Expenses

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)

14 Benefits paid to or for members (Part IX, column (A), line 4)

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

16a Professional fundraising fees (Part IX, column (A), line 11e)

b Total fundraising expenses (Part IX, column (D), line 25) ▶2,316,734

17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)

18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)

19 Revenue less expenses. Subtract line 18 from line 12

Net Assets or Fund Balances

20 Total assets (Part X, line 16)

21 Total liabilities (Part X, line 26)

22 Net assets or fund balances. Subtract line 21 from line 20

Part II Signature Block

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

Sign Here

Signature of officer

2022-05-13
Date

Julie Lautt Secretary/CFO
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date 2022-05-13

Check ☐ if self-employed

PTIN P00484560

Firm's name ▶ Eide Bailly LLP

Firm's EIN ▶ 45-0250958

Firm's address ▶ 800 Nicollet Mall Ste 1300
Minneapolis, MN 554027033

Phone no. (612) 253-6500

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 11282Y

Form 990 (2020)

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

Avera Health is a health ministry rooted in the Gospel. Our mission is to make a positive impact in the lives and health of persons and communities by providing quality services guided by Christian values.

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 organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations 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 \$ 292,572,064 including grants of \$ 30,646,490) (Revenue \$ 278,210,607)
See Additional Data

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ▶ 292,572,064

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1 Yes	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	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? If "Yes," complete Schedule C, Part I	3	No
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4 Yes	
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? If "Yes," complete Schedule C, Part III	5	No
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part 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? If "Yes," complete Schedule D, Part II	7	No
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8	No
9 Did the organization report an amount in Part X, line 21 for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	9 Yes	
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi endowments? If "Yes," complete Schedule D, Part V	10 Yes	
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? If "Yes," complete Schedule D, Part VI	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? If "Yes," complete Schedule D, Part VII	11b Yes	
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? If "Yes," complete Schedule D, Part VIII	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? If "Yes," complete Schedule D, Part IX	11d Yes	
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	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)? If "Yes," complete Schedule D, Part X	11f Yes	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a	No
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b Yes	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	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, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b Yes	
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	No
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	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? If "Yes," complete Schedule G, Part I (see instructions)	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? If "Yes," complete Schedule G, Part II	18 Yes	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a	No
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21 Yes	

Part IV Checklist of Required Schedules (continued)

		Yes	No
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22 Yes	
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a	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	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part 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? If "Yes," complete Schedule L, Part I	25b	No
26	Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II	26	No
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III	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, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV	28a	No
b	A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV	28b Yes	
c	A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? If "Yes," complete Schedule L, Part IV	28c Yes	
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29 Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	30	No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31	No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	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? If "Yes," complete Schedule R, Part I	33 Yes	
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	34 Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a Yes	
b	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b Yes	
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36	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? If "Yes," complete Schedule R, Part VI	37	No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O.	38 Yes	

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a 261	
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b 0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c Yes	

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

2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	1,976			
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b	Yes		3a	Yes
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3b	Yes		4a	No
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	4a			5a	No
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	5a			5b	No
b If "Yes," enter the name of the foreign country: ▶ _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).	5b			5c	
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5c			6a	No
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	6a			6b	
c If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	6b			7a	Yes
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	7a	Yes		7b	Yes
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	7b	Yes		7c	No
7 Organizations that may receive deductible contributions under section 170(c).	7c			7d	
a 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?	7d			7e	No
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7e			7f	No
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7f			7g	
d If "Yes," indicate the number of Forms 8282 filed during the year	7g			7h	
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7h			8	
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	8			9a	
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	9a			9b	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	9b			10	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	10			11a	
9 Sponsoring organizations maintaining donor advised funds.	11a			11b	
a Did the sponsoring organization make any taxable distributions under section 4966?	11b			12a	
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	12a			12b	
10 Section 501(c)(7) organizations. Enter:	12b			13a	
a Initiation fees and capital contributions included on Part VIII, line 12	13a			13b	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	13b			13c	
11 Section 501(c)(12) organizations. Enter:	13c			14a	No
a Gross income from members or shareholders	14a			14b	
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	14b			15	Yes
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	15	Yes		16	No
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	16				

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 or note to any line 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	1a 15		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.			
b Enter the number of voting members included in line 1a, above, who are independent	1b 10		
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		No
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6 Did the organization have members or stockholders?	6	Yes	
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	Yes	
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	Yes	
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		No
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 Did the organization have local chapters, branches, or affiliates?	10a	No
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	No
b Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes
13 Did the organization have a written whistleblower policy?	13	Yes
14 Did 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	Yes
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	No

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed▶

AL, AR, FL, GA, HI, KS, KY, MD, MA, MI, MN, MS, NH, NJ, NM, OR, PA, RI, SC, TN, UT, VA, WV, WI

18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records:
▶ Jamie Schaefer 3900 W Avera Dr Ste 300 Sioux Falls, SD 57108 (605) 322-3992

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

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

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

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

See instructions for the order in which to list the persons above.

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

[illegible]

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
See Additional Data Table										
1b Sub-Total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								12,023,143	1,223,293	591,033

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 235

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3 Yes	
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>	4 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>	5	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. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
Avera McKennan 1325 S Cliff Avenue Sioux Falls, SD 57117	Services	13,975,588
CDW Government 230 N Milwaukee Ave Vernon Hills, IL 60061	Computer Hardware; Consulting	13,430,887
Medical Information Technology Inc 1 Meditech Circle Westwood, MA 02090	Hardware/Software; Consulting	5,192,193
Medspeed 655 West Grand Avenue Elmhurst, IL 60126	Courier Services	3,848,113
Cisco Systems Capital Corporation 170 W Tasman Dr San Jose, CA 95134	Hardware/Software; Consulting	3,390,629

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ 137

Part VIII Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1a	Federated campaigns . . .	1a	199,382			
	b	Membership dues . . .	1b				
	c	Fundraising events . . .	1c	451,874			
	d	Related organizations	1d	16,372			
	e	Government grants (contributions)	1e	1,815,012			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	19,353,509			
	g	Noncash contributions included in lines 1a - 1f:\$	1g	1,735,275			
	h Total.	Add lines 1a-1f ▶		21,836,149			
	Program Service Revenue			Business Code			
2a		ACS revenue	900099	202,053,582	202,053,582		
b		Other revenue	900099	40,572,927	38,503,589	2,069,338	
c		eCare revenue	900099	24,425,603	24,425,603		
d		PACE revenue	561000	5,596,621	1,614,425	3,982,196	
e		Premier expense credits	900099	2,864,269	2,864,269		
f		All other program service revenue.		184,371	184,371		
g Total.	Add lines 2a-2f. ▶		275,697,373				
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) ▶		199,301		199,301	
	4	Income from investment of tax-exempt bond proceeds ▶					
	5	Royalties ▶					
	6a	Gross rents	(i) Real	(ii) Personal			
			6a	1,972,913			
			b	Less: rental expenses	6b	1,807,270	
	c	Rental income or (loss)	6c	165,643			
	d	Net rental income or (loss) ▶		165,643		165,643	
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
			7a	16,908,592			
			b	Less: cost or other basis and sales expenses	7b	0	
	c	Gain or (loss)	7c	16,908,592			
	d	Net gain or (loss) ▶		16,908,592		422,265	16,486,327
	8a	Gross income from fundraising events (not including \$ 451,874 of contributions reported on line 1c). See Part IV, line 18	8a	273,443			
			b	Less: direct expenses	8b	76,279	
	c	Net income or (loss) from fundraising events . . . ▶		197,164		197,164	
	9a	Gross income from gaming activities. See Part IV, line 19	9a				
			b	Less: direct expenses	9b		
	c	Net income or (loss) from gaming activities . . . ▶					
10a	Gross sales of inventory, less returns and allowances . . .	10a					
		b	Less: cost of goods sold . . .	10b			
c	Net income or (loss) from sales of inventory . . . ▶						
Miscellaneous Revenue		Business Code					
11a	A/R Interest	900099	8,564,768	8,564,768			
b							
c							
d	All other revenue						
e Total.	Add lines 11a-11d ▶		8,564,768				
12 Total revenue.	See instructions ▶		323,568,990	278,210,607	6,639,442	16,882,792	

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	30,587,047	30,587,047		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	59,443	59,443		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	7,015,041		7,015,041	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	129,740	129,740		
7 Other salaries and wages	128,547,239	108,205,966	18,892,633	1,448,640
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)	32,328,306	31,194,896	1,037,478	95,932
9 Other employee benefits	17,183,227	14,012,853	2,936,641	233,733
10 Payroll taxes	8,830,855	8,286,838	446,135	97,882
11 Fees for services (non-employees):				
a Management				
b Legal	771,413	714,581	56,832	
c Accounting	1,531,254	1,531,254		
d Lobbying	249,325	249,325		
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	34,283,919	30,515,769	3,682,616	85,534
12 Advertising and promotion	8,093,310	8,039,091	4,103	50,116
13 Office expenses	7,504,621	6,676,308	724,229	104,084
14 Information technology	22,041,333	21,827,351	66,637	147,345
15 Royalties				
16 Occupancy	6,133,997	3,974,599	2,123,670	35,728
17 Travel	699,083	618,465	71,618	9,000
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	553,557	540,080	13,616	-139
20 Interest	850,183	711,914	138,269	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	19,659,605	18,871,580	782,743	5,282
23 Insurance	-482,008	-542,330	60,322	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Repairs and maintenance	4,518,654	4,378,647	139,995	12
b UBI tax	885,964	885,964		
c Lease and rental	34,927	7,253	27,197	477
d				
e All other expenses	1,133,212	1,095,430	34,674	3,108
25 Total functional expenses. Add lines 1 through 24e	333,143,247	292,572,064	38,254,449	2,316,734
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part IX ☒

				(A) Beginning of year		(B) End of year	
Assets	1	Cash—non-interest-bearing			1		
	2	Savings and temporary cash investments		25,050,804	2	28,905,697	
	3	Pledges and grants receivable, net		524,649	3	1,742,261	
	4	Accounts receivable, net		30,791,487	4	29,283,558	
	5	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5		
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6		
	7	Notes and loans receivable, net			7		
	8	Inventories for sale or use		584,602	8	396,483	
	9	Prepaid expenses and deferred charges		8,136,519	9	15,988,570	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	233,627,462			
	b	Less: accumulated depreciation	10b	131,932,154	98,966,598	10c	101,695,308
	11	Investments—publicly traded securities		1,070,788,545	11	1,294,673,040	
	12	Investments—other securities. See Part IV, line 11		165,755,052	12	148,615,736	
	13	Investments—program-related. See Part IV, line 11		12,588	13	32,516	
	14	Intangible assets		16,139,552	14	16,139,552	
	15	Other assets. See Part IV, line 11		96,296,689	15	124,469,181	
16	Total assets. Add lines 1 through 15 (must equal line 33)		1,513,047,085	16	1,761,941,902		
Liabilities	17	Accounts payable and accrued expenses		25,278,499	17	34,826,307	
	18	Grants payable			18		
	19	Deferred revenue		7,439,578	19	6,753,531	
	20	Tax-exempt bond liabilities		23,209,808	20	20,936,012	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		951,318,025	21	1,108,976,303	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22		
	23	Secured mortgages and notes payable to unrelated third parties		34,732,688	23	33,371,297	
	24	Unsecured notes and loans payable to unrelated third parties			24		
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D		124,113,683	25	169,538,746	
	26	Total liabilities. Add lines 17 through 25		1,166,092,281	26	1,374,402,196	
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ and complete lines 27, 28, 32, and 33.						
	27	Net assets without donor restrictions		340,335,399	27	379,904,627	
	28	Net assets with donor restrictions		6,619,405	28	7,635,079	
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.						
	29	Capital stock or trust principal, or current funds			29		
	30	Paid-in or capital surplus, or land, building or equipment fund			30		
	31	Retained earnings, endowment, accumulated income, or other funds			31		
	32	Total net assets or fund balances		346,954,804	32	387,539,706	
33	Total liabilities and net assets/fund balances		1,513,047,085	33	1,761,941,902		

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	323,568,990
2	Total expenses (must equal Part IX, column (A), line 25)	2	333,143,247
3	Revenue less expenses. Subtract line 2 from line 1	3	-9,574,257
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	346,954,804
5	Net unrealized gains (losses) on investments	5	44,963,019
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	5,196,140
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	387,539,706

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		No
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis	Yes	
c If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	Yes	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	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	

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Form 990 (2020)

Form 990, Part III, Line 4a:

Avera Health is a nonprofit corporation jointly sponsored by the Sisters of the Presentation of the Blessed Virgin Mary of Aberdeen, South Dakota and the Benedictine Convent of the Sacred Heart of Yankton, South Dakota, together referenced as the "Sisters." Avera Health acts as the leader of the Avera health ministry, serving as an overall parent to support its affiliated tax-exempt health care organizations. These organizations provide services principally in eastern South Dakota and surrounding states. Avera Health provides management consulting, fund raising and other administrative services to the hospitals, long-term health care facilities, clinics, services and programs that are sponsored or otherwise affiliated with the Sisters. Avera eCARE is a visionary care delivery model that provides rural health care professionals around-the-clock access to specialty care physicians, nurses and pharmacists. Using advanced communication technology, eCARE supports rural facilities in the provision of evidence-based, high-quality care and offsets workforce shortages in rural communities. eCARE is a natural extension of Avera's Health mission and its century-long commitment to its rural communities to maintain access to quality care close to home. Avera eCARE works with some of the most underserved populations in the United States. This includes frontier populations, long term care residents, Native American Reservations, disabled veterans, and inmates. By bringing high quality, on demand access to specialty care, these unique populations are able to receive care within their home community and in a familiar, culturally appropriate setting. They are treated in coordination with the local practitioners that best understand their ongoing care needs. During the COVID pandemic over the last two years, Avera Health and its affiliated entities have stewarded significant funding toward community benefit, from our own resources and from state and federal assistance and relief funds. When the first cases were identified in 2020, we created a 24/7 hotline people could call to inquire about testing, treatment, and later vaccination. This hotline minimized the burden of clinics and helped protect patients and the public by keeping patients from presenting to healthcare facilities in person. Along with the hotline, Avera launched an innovative and specialized program for caring for COVID patients at home, including daily check-ins, virtual visits (if needed) and at-home oxygen therapy. Throughout the pandemic this program has supported patients and kept hospitals from becoming overwhelmed. Additionally, we launched public awareness campaigns for masking and vaccination that included earned media, paid advertising, and digital presence. We set up testing sites and events, including a mass testing event for workers at the local protein plant. The state delegated vaccination efforts to South Dakota's health systems, and our state was recognized nationally for our "shots in arms" efficiency. Avera led efforts to prioritize those at highest risk, including not only elderly and infirm but homeless, congregate living residents and protein plant workers which included a high percentage of immigrants. We participated in national research for COVID therapies including convalescent plasma, monoclonal antibodies and antiviral medications. We worked with local and state officials to inform the public at regular press conferences and expanded bed capacity by reallocating resources across all hospitals in our system. Avera partnered with other health facilities and systems to ensure capacity for the sickest patients, and those in need of ICU care and ventilators. Avera also launched efforts to support and retain health care workforce, including such things as paying health insurance premiums, providing support payments, \$2 across-the-board pay increases, increased on-call pay and shift differentials, and more.

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Bob Sutton President/CEO	40.00 4.50	X		X				1,749,379	0	51,920
Dr Luis Rojas-Espallat Director	5.00 40.00	X						0	759,905	48,824
Dr Jason Wickersham Director	5.00 40.00	X						0	406,922	45,525
Dr Merritt Gregg Warren Chair	5.00 40.00	X		X				0	56,466	11,040
Sister Janet Horstman Vice Chair	5.00 0.00	X		X				0	0	0
Sister Mary Jaeger PVBM Director	5.00 0.00	X						0	0	0
Sister Debra Kolecka OSB Director	5.00 3.00	X						0	0	0
Sister Mary Kay Panowicz Director	5.00 1.00	X						0	0	0
Sister Penny Bingham Director	5.00 4.00	X						0	0	0
Sister Pam Donelan Director	5.00 0.00	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Lori Essig Director	5.00 0.00	X						0	0	0
Robert Fouberg Director	5.00 0.00	X						0	0	0
Clark Sinclair Director	5.00 0.00	X						0	0	0
Doneen Hollingsworth Director	5.00 0.00	X						0	0	0
Gary Gaspar Director	5.00 0.00	X						0	0	0
Julie Lautt CFO Avera Health; Sec/Treas	40.00 1.40			X				903,545	0	36,378
David Flicek Pres/CEO - Avera McKennan	0.00 42.00				X			1,275,864	0	45,092
Todd Forkel Pres/CEO - Avera St. Luke's	0.00 42.00				X			728,359	0	42,148
Deanna Larson CEO - eCare	40.00 0.00				X			444,674	0	40,176
Tom Clark Chief Strategy & Growth Officer	40.00 0.00				X			587,865	0	45,092

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Doug Ekeren President/CEO -Sacred Heart	0.00 47.00				X			626,756	0	40,677
David Erickson Chief Medical/Innovation Officer	40.00 4.00					X		905,630	0	44,796
Richard Korman Senior VP - General Counsel	40.00 0.00					X		732,582	0	52,055
James Veline - Senior Vice Pres - Chief Information Officer	40.00 0.00					X		1,086,624	0	20,376
Robin Bates - Executive VP Insurance Svcs & Population	40.00 0.00					X		880,985	0	26,946
Richard Molseed Exec VP - Governance & Strategy	40.00 0.00					X		1,771,632	0	24,321
Jim Breckenridge Former CFO Avera Health; Sec/Treas	0.00 0.00						X	329,248	0	15,667

SCHEDULE A
(Form 990 or 990-EZ)

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

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Avera Health

Employer identification number
46-0422673

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 12, 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 (Form 990 or 990-EZ).)
- 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 agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:
- 10☒ 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.)
- 11☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12☐ 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 in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			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 failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support							
	Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .						
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						
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.						

Section B. Total Support							
Calendar year (or fiscal year beginning in) ►		(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7	Amounts from line 4. . .						
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . .						
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 VI.). . .						
11	Total support. Add lines 7 through 10						
12	Gross receipts from related activities, etc. (see instructions)					12	
13	First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ► ☐						

Section C. Computation of Public Support Percentage		
14	Public support percentage for 2020 (line 6, column (f) divided by line 11, column (f))	14
15	Public support percentage for 2019 Schedule A, Part II, line 14	15
16a	33 1/3% support test—2020. 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—2019. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ► ☐	
17a	10%-facts-and-circumstances test—2020. 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 VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► ☐	
b	10%-facts-and-circumstances test—2019. 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 VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► ☐	
18	Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► ☐	

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	15,789,136	14,467,701	17,411,813	23,574,843	21,836,149	93,079,642
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	186,830,145	207,086,072	254,799,501	266,987,769	278,210,607	1,193,914,094
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	202,619,281	221,553,773	272,211,314	290,562,612	300,046,756	1,286,993,736
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	33,177	101,472	63,613	368,889	446,030	1,013,181
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.	122,171,044	130,522,462	166,560,168	178,295,346	177,531,681	775,080,701
c Add lines 7a and 7b.	122,204,221	130,623,934	166,623,781	178,664,235	177,977,711	776,093,882
8 Public support. (Subtract line 7c from line 6.)						510,899,854

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6.	202,619,281	221,553,773	272,211,314	290,562,612	300,046,756	1,286,993,736
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2,768,304	1,317,953	157,217	22,385	199,301	4,465,160
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.		249,441	509,369	1,094,391	2,515,692	4,368,893
c Add lines 10a and 10b.	2,768,304	1,567,394	666,586	1,116,776	2,714,993	8,834,053
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.	343,127	309,458	260,272	369,995	197,164	1,480,016
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)	205,730,712	223,430,625	273,138,172	292,049,383	302,958,913	1,297,307,805
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. ► ☐						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2020 (line 8, column (f) divided by line 13, column (f))	15	39.380 %
16 Public support percentage from 2019 Schedule A, Part III, line 15	16	39.150 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2020 (line 10c, column (f) divided by line 13, column (f))	17	0.680 %
18 Investment income percentage from 2019 Schedule A, Part III, line 17	18	0.560 %

- 19a 33 1/3% support tests—2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ► ☒
- b 33 1/3% support tests—2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization. ► ☐
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ► ☐

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV

Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
b Did the activities described in line 2a constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>		
b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI. the role played by the organization in this regard.</i>		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations			
1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (<i>explain in Part VI</i>). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.			
Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	1	
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	
Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)		

Part V

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

Section D - Distributions		Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (<i>prior IRS approval required - provide details in Part VI</i>)	5	
6 Other distributions (<i>describe in Part VI</i>). See instructions	6	
7 Total annual distributions. Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions	8	
9 Distributable amount for 2020 from Section C, line 6	9	
10 Line 8 amount divided by Line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2020	(iii) Distributable Amount for 2020
1 Distributable amount for 2020 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2020 (reasonable cause required-- <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2020:			
a From 2015.			
b From 2016.			
c From 2017.			
d From 2018.			
e From 2019.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2020 distributable amount			
i Carryover from 2015 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2020 from Section D, line 7:			
\$			
a Applied to underdistributions of prior years			
b Applied to 2020 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2021. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2016.			
b Excess from 2017.			
c Excess from 2018.			
d Excess from 2019.			
e Excess from 2020.			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

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

If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

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

If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of the organization Avera Health	Employer identification number 46-0422673
--	--

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1	Provide a description of the organization's direct and indirect political campaign activities in Part IV (see instructions for definition of "political campaign activities")	
2	Political campaign activity expenditures (see instructions)	\$
3	Volunteer hours for political campaign activities (see instructions)	

Part I-B Complete if the organization is exempt under section 501(c)(3).

1	Enter the amount of any excise tax incurred by the organization under section 4955	\$
2	Enter the amount of any excise tax incurred by organization managers under section 4955	\$
3	If the organization incurred a section 4955 tax, did it file Form 4720 for this year?	☐ Yes ☐ No
4a	Was a correction made?	☐ Yes ☐ No
b	If "Yes," describe in Part IV.	

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1	Enter the amount directly expended by the filing organization for section 527 exempt function activities	\$
2	Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities	\$
3	Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b.	\$
4	Did the filing organization file Form 1120-POL for this year?	☐ Yes ☐ No
5	Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.	

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
1				
2				
3				
4				
5				
6				

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		
b Total lobbying expenditures to influence a legislative body (direct lobbying)		
c Total lobbying expenditures (add lines 1a and 1b)		
d Other exempt purpose expenditures		
e Total exempt purpose expenditures (add lines 1c and 1d)		
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	
Not over \$500,000	20% of the amount on line 1e.	
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	
Over \$17,000,000	\$1,000,000.	
g Grassroots nontaxable amount (enter 25% of line 1f)		
h Subtract line 1g from line 1a. If zero or less, enter -0-		
i Subtract line 1f from line 1c. If zero or less, enter -0-		
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?	☐ Yes ☐ No	

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

		(a)		(b)
		Yes	No	Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a	Volunteers?		No	
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	Yes		
c	Media advertisements?		No	
d	Mailings to members, legislators, or the public?		No	
e	Publications, or published or broadcast statements?		No	
f	Grants to other organizations for lobbying purposes?		No	
g	Direct contact with legislators, their staffs, government officials, or a legislative body?	Yes		5,752
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		No	
i	Other activities?	Yes		243,573
j	Total. Add lines 1c through 1i			249,325
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		No	
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

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

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."

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

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
Part II-B, Line 1:	Through paid staff and paid consultants Avera Health meets with legislators. Avera Health provides grants to other organizations for lobbying and pays dues of which a small portion is attributable to lobbying.

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SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
► Attach to Form 990.
► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Avera Health

Employer identification number
46-0422673

Part I

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?

☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can 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?

☐ Yes ☐ No

Part II

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

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

☐ Preservation of land for public use (e.g., recreation or education)

☐ Preservation of an historically important land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

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

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax 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?

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ►

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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 section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9 In Part XIII, 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" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, 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 XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, 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) Revenue included on 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 FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ► \$

b Assets included in Form 990, Part X ► \$

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

Cat. No. 52283D Schedule D (Form 990) 2020

Part III

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

3

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

a

☐ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . .

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements.

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

1a

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

☐ Yes

☒ No

b

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

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . .

☒ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

☒

Part V

Endowment Funds.

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	6,403,165	5,765,277	5,295,563	5,004,011	4,854,052
b Contributions	1,694,590	820,309	392,984	421,937	583,639
c Net investment earnings, gains, and losses	432,897	128,114	629,457	280,361	147,566
d Grants or scholarships					
e Other expenditures for facilities and programs	696,359	273,739	527,554	386,932	548,377
f Administrative expenses	36,245	36,796	25,173	23,814	32,869
g End of year balance	7,798,048	6,403,165	5,765,277	5,295,563	5,004,011

2

Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a

Board designated or quasi-endowment ▶ 43.770 %

b

Permanent endowment ▶ 13.400 %

c

Term endowment ▶ 42.830 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a

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

(i) Unrelated organizations

3a(i)

Yes

No

(ii) Related organizations

3a(ii)

Yes

No

b

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

3b

Yes

No

4

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

Part VI

Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		948,600		948,600
b Buildings		33,647,748	12,035,818	21,611,930
c Leasehold improvements		3,215,169	2,402,582	812,587
d Equipment		161,363,856	117,493,754	43,870,102
e Other		34,452,089		34,452,089
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				101,695,308

Schedule D (Form 990) 2020

Part VII

Investments—Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) Interest in Innovation Institute	13,047,131	F
(B) Non-publicly traded hedge, private equity, debt, and multi-strategy funds	120,178,322	F
(C) Non-publicly traded real estate	15,290,283	F
(D) NPPC, LLC	100,000	C
(E)		
(F)		
(G)		
(H)		
(I)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶	148,615,736	

Part VIII

Investments—Program Related.

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, col.(B) line 13.) ▶		

Part IX

Other Assets.

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

(a) Description	(b) Book value
(1)Deferred financing costs	14,145,515
(2)Interest in South Dakota Community Foundation	1,113,321
(3)Deferred compensation	95,303,456
(4)Swap account	111,332
(5)Right of use operating lease	9,684,303
(6)Line of credit - Avel	1,200,000
(7)Tax Receivable Agreement	2,911,254
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 15.) ▶	124,469,181

Part X

Other Liabilities.

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) Estimated insurance claims payable	41,441,914
(3) Bond interest payable	9,266,846
(4) Due to affiliated entities	6,438,747
(5) Deferred compensation	95,303,456
(6) Deferred payroll tax	5,168,909
(7) Long-term commitments	9,950,000
(8) Right of use lease obligations	1,968,874
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.) ▶	169,538,746

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

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	
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 XIII.)	4b		
c	Add lines 4a and 4b		4c	
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	
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 XIII.)	2d		
e	Add lines 2a through 2d		2e	
3	Subtract line 2e from line 1		3	
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 XIII.)	4b		
c	Add lines 4a and 4b		4c	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	

Part XIII Supplemental Information

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

Return Reference	Explanation
See Additional Data Table	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Supplemental Information

Return Reference	Explanation
Part IV, Line 2b:	Avera Health administers the Avera Health Pooled Investment Fund, a fund that is maintained for the benefit of facilities that are sponsored, operated, or managed by Avera Health. Investments are made in conformity with the objectives and guidelines of the Avera Health Pooled Investment Committee. Within the fund, participating facilities share in a pool of investments that are managed by various fund managers. Investments that are held for participating facilities are recorded as Avera Health Pooled Investments with a corresponding liability account of Custodial Funds - Avera Health Pooled Investments on the balance sheet. Avera Health also holds its own investments within the pooled fund and records their allocated share of income and losses from these investments as investment income in the financial statements.

Supplemental Information	
Return Reference	Explanation
Part V, Line 4:	The Organization's endowment consists of funds established for a variety of purposes related to health and wellness programs in Avera affiliated organizations.

Supplemental Information

Return Reference	Explanation
Part X, Line 2:	Avera Health and its sponsored organizations believe that they have appropriate support for any tax positions taken affecting its annual filing requirements, and as such, does not have any uncertain tax positions that are material to the consolidated financial statements. The Organization would recognize future accrued interest and penalties related to unrecognized tax benefits and liabilities in income tax expense if such interest and penalties are incurred.

SCHEDULE F
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
Avera Health

Statement of Activities Outside the United States

► Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
► Attach to Form 990.
► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Employer identification number
46-0422673

Part I

General Information on Activities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

- 1 For grantmakers. Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☐ Yes ☐ No
- 2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.
- 3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
Central America and the Caribbean -	0	0	Investments		120,178,322
3a Sub-total	0	0			120,178,322
b Total from continuation sheets to Part I	0	0			0
c Totals (add lines 3a and 3b)	0	0			120,178,322

Part II Grants and Other Assistance to Organizations or Entities Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

1	(a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)

- 2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ► _____
- 3 Enter total number of other organizations or entities ► _____

Part III	Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 16.
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Part III can be duplicated if additional space is needed.

[illegible]

Part IV Foreign Forms

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* ☐ Yes ☒ No
- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* ☐ Yes ☒ No
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)* ☒ Yes ☐ No
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)* . ☒ Yes ☐ No
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* ☐ Yes ☒ No
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990).* ☐ Yes ☒ No

Part V **Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

990 Schedule F, Supplemental Information

Return Reference	Explanation
Part III Accounting Method:	

990 Schedule F, Supplemental Information

Return Reference	Explanation
Form 990, Schedule F, Part IV:	Avera Health reviews its direct and indirect investments during the tax period for determining required foreign filings. The Organization's ownership interests in foreign corporations do not require a Form 5471 to be filed. The Organization invests in partnerships that hold direct or indirect interest in passive foreign investment companies. The investment partnerships have properly filed Form 8621, or the underlying investments did not generate any unrelated business income. Under these facts, Avera Health is not required to file an additional Form 8621.

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1 Race Against Breast Cancer (event type)	(b) Event #2 Deck the Halls (event type)	(c) Other events 12 (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	299,277	89,491	314,803	703,571
	2 Less: Contributions	209,892	71,853	161,460	443,205
	3 Gross income (line 1 minus line 2)	89,385	17,638	153,343	260,366
Direct Expenses	4 Cash prizes	0	0	0	
	5 Noncash prizes	0	0	0	
	6 Rent/facility costs	0	0	1,473	1,473
	7 Food and beverages	0	0	1,405	1,405
	8 Entertainment	0	0	0	
	9 Other direct expenses	56,363	0	16,546	72,909
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				75,787
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				184,579

Part III Gaming. Complete if the organization answered "Yes" on 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				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
Direct Expenses	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct 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 conduct 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 conducted in:		
a	The organization's facility	13a	%
b	An outside facility	13b	%
14	Enter 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 of the third party:		
	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 Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Return Reference	Explanation
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Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

Schedule I
(Form 990)

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

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

▶ Attach to Form 990.

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

OMB No. 1545-0047

2020

Open to Public
Inspection

Department of the
Treasury
Internal Revenue Service
Name of the organization
Avera Health

Employer identification number

46-0422673

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) See Additional Data							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 105

3 Enter total number of other organizations listed in the line 1 table 11

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.

Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) Medical assistance to employees	18	43,443			
(2) Medical educational scholarships	10	16,000			
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					

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

Return Reference	Explanation
Part I, Line 2:	The Organization makes grants to other organizations exempt under 501(c)(3) to ensure the funds will be used for charitable purposes. During the year ending June 30, 2021, the Organization made contributions to other non-public charities in furtherance of community development. The contributions are approved by the Board for this purpose. Scholarship funds have different sets of criteria for determining eligibility and winners. Assistance to individuals is determined with assistance from each hospital's social services department or within a committee at the hospital.

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Abbott House Foundation 909 Court Merrill St Mitchell, SD 57301	46-0379896	501c3	22,500				Sponsorship
Aberdeen Catholic School System 1400 N Dakota St Aberdeen, SD 57401	46-0336005	501c3	85,971				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Aberdeen Christian School 1500 Hwy 281 N Aberdeen, SD 57401	91-1806433	501c3	10,000				Sponsorship
Aberdeen Development Corporation 506 S Main St Ste 2 Aberdeen, SD 57401	46-6011831	501c6	10,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Aberdeen Ride Line 205 N 4th St Aberdeen, SD 57401	46-6000010	501c3	20,000				Sponsorship
Alexander Mitchell Library Foundation Inc 215 SE 4th Ave Aberdeen, SD 57401	46-0428183	501c3	30,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ALS Association - MNNDSD Chapter 1919 University Ave W Ste 175 Saint Paul, MN 55104	41-1756085	501c3	10,000				Sponsorship
American Cancer Society 250 Williams St Atlanta, GA 30303	13-1788491	501c3	52,500				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
American Telemedicine Association 1100 Connecticut Ave NW Ste 540 Washington, DC 20036	74-2676503	501c3	10,000				Sponsorship
Banquet 900 E 8th St Sioux Falls, SD 571031604	46-0387495	501c3	56,500				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Beresford School District #61-2 301 W Maple Beresford, SD 57004	47-6002216	City of Beresford	19,552				Sponsorship
Bishop Dudley Hospitality House 101 N Indiana Ave Sioux Falls, SD 57103	91-1836528	501c3	16,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Bishop O'Gorman Catholic Schools 3100 W 41st St Sioux Falls, SD 57105	46-0413591	501c3	1,700,000				Sponsorship
Boy Scouts of America - Sioux Council 800 N West Ave Sioux Falls, SD 57104	46-0224599	501c3	6,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Boys & Girls Club of Aberdeen Area 1121 1st Ave SE Aberdeen, SD 57401	23-7062273	501c3	9,000				Sponsorship
Boys & Girls Club of Brookings SD Inc 1126 Southland Lane Brookings, SD 57006	73-1630215	501c3	50,250				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Boys & Girls Club of the Sioux Empire 824 E 14th St Sioux Falls, SD 57104	46-0399482	501c3	20,000				Sponsorship
Brookings School District 2130 8th St S Brookings, SD 57006	46-6000834	City of Brookings	38,162				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Capital Area Counseling Service Inc 800 E Dakota PO Box 148 Pierre, SD 57501	46-0305571	501c3	110,000				Sponsorship
Capital Area United Way PO Box 1111 Pierre, SD 575011111	46-0403398	501c3	10,506				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Catholic Community Foundation for Eastern SD 523 N Duluth Ave Sioux Falls, SD 571042714	46-6000424	501c3	110,000				Sponsorship
Central Lyon Community School 1010 S Greene St Rock Rapids, IA 51246	42-6037624	City of Rock Rapids	15,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Charis Ministry Partners 1300 E 10th St Sioux Falls, SD 57103	38-3775128	501c3	7,000				Sponsorship
Children's Home Society of South Dakota Foundation PO Box 1749 Sioux Falls, SD 571011749	46-0224542	501c3	18,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Citizens Involvement Council 110 W Missouri Ave Pierre, SD 57501	46-0317107	501c3	15,000				Sponsorship
City of Aberdeen 123 S Lincoln St Aberdeen, SD 574014215	46-6000010	City of Aberdeen	200,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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City of Pierre 2301 Patron Pkwy Ste 1 Pierre, SD 57501	46-6000356	City of Pierre	75,000				Sponsorship
City of Yankton PO Box 176 Yankton, SD 57078	46-6000567	City of Yankton	200,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Compass Center 1704 S Cleveland Ave Ste 3 Sioux Falls, SD 57103	46-0350199	501c3	7,500				Sponsorship
Dakota Resources 25795 475th Ave Ste 1 Renner, SD 57055	46-0442430	501c3	25,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Dakota Wesleyan University 1200 W University Ave Mitchell, SD 57301	46-0224589	501c3	34,500				Scholarship; Sponsorship
DakotAbilities 1116 S 4th Ave Sioux Falls, SD 57105	46-0306216	501c3	16,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Delta Dental of South Dakota Foundation 804 N Euclid Ave Ste 101 Pierre, SD 57501	91-1776857	501c3	20,000				Sponsorship
Destiny Healthcare International PO Box 90648 Sioux Falls, SD 57109	51-0529480	501c3	30,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Downtown Sioux Falls Inc 230 S Phillips Ave Ste 306 Sioux Falls, SD 571046708	36-3627217	501c4	22,000				Sponsorship
EmBe 300 W 11th St Sioux Falls, SD 571046306	46-0234998	501c3	46,778				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Face It Together 5020 S Tennis Ln Ste 4 Sioux Falls, SD 57108	27-2501220	501c3	20,000				Sponsorship
Fellowship of Christian Athletes 1208 Horizon Dr Marshall, MN 56258	44-0610626	501c3	16,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Friends of Levitt Shell Sioux Falls 524 N Main Ave 106 Sioux Falls, SD 57104	61-1699910	501c3	20,000				Sponsorship
Furniture Mission of South Dakota 209 N Nesmith Ave Sioux Falls, SD 57103	81-0584450	501c3	15,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Greater Sioux Falls Chamber of Commerce 200 N Phillips Ave Ste 200 Sioux Falls, SD 571046058	46-0189300	501c6	12,800				Sponsorship
Greatlife Cares Foundation 3800 W 53rd St Sioux Falls, SD 57106	47-2447820	501c3	19,500				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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GroundWorks 102 N Krohns Pl Ste 113 Sioux Falls, SD 57103	47-5498537	501c3	7,500				Sponsorship
Habitat for Humanity 721 E Amidon St Sioux Falls, SD 57104	46-0407140	501c3	6,500				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Harrisburg Baseball Association Inc PO Box 434 Harrisburg, SD 57032	27-0606157	501c3	8,000				Sponsorship
Helpline Center Inc 1000 N West Ave Ste 310 Sioux Falls, SD 571041314	23-7424387	501c3	15,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
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Junior Achievement of South Dakota 1000 N West Ave Ste 110 Sioux Falls, SD 57104	46-0306352	501c3	25,650				Sponsorship
Leadership South Dakota PO Box 675 Platte, SD 57369	46-2384525	501c3	11,000				Sponsorship

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Leukemia & Lymphoma Society 1711 Broadway St NE Minneapolis, MN 55413	13-5644916	501c3	20,500				Sponsorship
LifeScape Foundation 2011 W 26th St Ste 201 Sioux Falls, SD 57105	46-5151247	501c3	15,000				Sponsorship

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Lost and Foundation Association 5015 S Crossing Pl 110 Sioux Falls, SD 57108	45-4306370	501c3	10,000				Sponsorship
Make-A-Wish Foundation of SD 1400 W 17th St Sioux Falls, SD 57104	46-0375953	501c3	10,000				Sponsorship

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McCrossan Boys Ranch 47135 260th St Sioux Falls, SD 571079905	46-0311913	501c3	15,000				Sponsorship
Mitchell Area Safehouse Inc 1809 N Wisconsin St Mitchell, SD 57301	46-0389086	501c3	10,000				Sponsorship

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Mitchell School District 17-2 821 N Capital St Mitchell, SD 57301	46-6001338	City of Mitchell	10,000				Sponsorship
Mitchell Technical College Foundation 1800 E Spruce St Mitchell, SD 57301	46-0452950	501c3	92,000				Sponsorship

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Mitchell United Way 417 N Main St Ste 103 Mitchell, SD 57301	46-1250302	501c3	7,354				Sponsorship
Mount Marty College 1105 W 8th St Yankton, SD 57078	46-0283336	501c3	286,000				Scholarship; Sponsorship

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Multi-Cultural Center of Sioux Falls 515 N Main Ave Sioux Falls, SD 57104	46-0445034	501c3	10,000				Sponsorship
NAMI South Dakota PO Box 88808 Sioux Falls, SD 571098808	36-3593027	501c3	35,000				Sponsorship

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National Kidney Foundation 2601 S Minnesota Ave Ste 105 Sioux Falls, SD 57105	13-1673104	501c3	15,500				Sponsorship
National Multiple Sclerosis Society 733 Third Ave New York, NY 10017	41-0790658	501c3	16,000				Sponsorship

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No Way on Amendment A (SD Chamber of Commerce & Industry) PO Box 190 Pierre, SD 57501	46-0141180	501c6	25,000				Sponsorship
NSU Foundation 620 15th Ave SE Aberdeen, SD 57401	23-7002314	501c3	151,000				Scholarship; Sponsorship

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Office of Attorney General 1302 E Hwy 14 Ste 2 Pierre, SD 575018502	46-6000364	State of SD	50,000				Sponsorship
Pierre School District 211 S Poplar Pierre, SD 57501	46-6001892	City of Pierre	10,000				Sponsorship

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Prairie Family Business Association 4801 N Career Ave Sioux Falls, SD 57107	46-6000364	City of Sioux Falls	5,650				Sponsorship
Presentation College 1500 N Main St Aberdeen, SD 57401	46-0280847	501c3	100,000				Scholarship; Sponsorship

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Presentation Sisters of the Blessed Virgin Mary 1500 N 2nd St Aberdeen, SD 57401	46-0253283	501c3	22,500				Sponsorship
President's Bowl PO Box 1443 Sioux Falls, SD 571011443	91-1776303	501c3	20,000				Sponsorship

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Pride in the Tiger Foundation 400 Tiger Dr Marshall, MN 56258	41-1948007	501c3	10,000				Sponsorship
REACH Literacy 2101 W 41st St Ste 23 Sioux Falls, SD 57105	46-0396579	501c3	5,500				Sponsorship

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River Cities Public Transit 1600 E Dakota Ave Pierre, SD 57501	46-0449059	City of Pierre	8,000				Sponsorship
Ronald McDonald House Charities of SD 825 S Lake Ave Sioux Falls, SD 57104	46-0371152	501c3	27,000				Sponsorship

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Safe Harbor PO Box 41 Aberdeen, SD 574020041	46-0344310	501c3	10,000				Sponsorship
SculptureWalk Inc 300 S Phillips Ave Ste L104 Sioux Falls, SD 57104	20-8535871	501c3	17,000				Sponsorship

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Sioux Empire Baseball Association 1601 W 44th Pl Ste 3 Sioux Falls, SD 571056377	41-1903475	501c3	24,000				Sponsorship
Sioux Empire United Way 1000 N West Ave Ste 120 Sioux Falls, SD 571041314	46-0233701	501c3	89,800				Sponsorship

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Sioux Falls Area CASA Program PO Box 1901 Sioux Falls, SD 571011901	46-0430647	501c3	10,000				Sponsorship
Sioux Falls Area Community Foundation 200 N Cherapa Pl Sioux Falls, SD 57103	31-1748533	501c3	29,500				Sponsorship

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Sioux Falls Family YMCA 220 S Minnesota Sioux Falls, SD 57104	46-0225021	501c3	7,000				Sponsorship
Sioux Falls Public Schools Education Foundation PO Box 560 Sioux Falls, SD 57101	26-3537657	501c3	11,000				Sponsorship

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Sioux Falls School District 49-5 201 E 38th St Sioux Falls, SD 571055898	46-6002586	City of Sioux Falls	115,100				Sponsorship
SMSU Foundation FH 229 Marshall, MN 56258	23-7108470	501c3	60,000				Sponsorship

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South Dakota Agricultural and Rural Leadership Foundation Box 2170 Animal Science Ctr 132 Brookings, SD 57007	36-4293293	501c3	10,000				Sponsorship
South Dakota Chamber of Commerce and Industry PO Box 190 Pierre, SD 575010190	46-0141180	501c6	10,500				Sponsorship

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South Dakota Community Foundation Po Box 296 Pierre, SD 57501	46-0398115	501c3	11,270,000				Sponsorship
South Dakota Hall of Fame 1480 S Main Chamberlain, SD 57325	46-0324210	501c3	31,000				Sponsorship

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South Dakota Parks and Wildlife Foundation 523 E Capitol Ave Pierre, SD 57501	46-0387968	501c3	52,500				Sponsorship
South Dakota State University Foundation 815 Medary Ave Lohr Build Brookings, SD 57007	46-0273801	501c3	87,000				Sponsorship

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South Dakota Symphony Orchestra 301 S Main Ave Sioux Falls, SD 57104	46-6017026	501c3	40,000				Sponsorship
South Dakota Youth Foundation Inc 1310 Main Ave S Ste 109 Brookings, SD 57006	47-4832848	501c3	10,000				Sponsorship

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South Dakotans Decide Healthcare 3708 W Brooks Pl Sioux Falls, SD 57106	86-2041240	501c4	250,000				Sponsorship
Southeast Technical Institute 2320 N Career Ave Sioux Falls, SD 57107	46-6002586	City of Sioux Falls	27,185				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Special Olympics South Dakota 800 East I-90 Lane Sioux Falls, SD 57104	46-0359776	501c3	10,000				Sponsorship
St Francis House 1301 E Austin St Sioux Falls, SD 57103	46-0423202	501c3	60,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Teach for America-South Dakota 132 Main Street Mission, SD 57555	13-3541913	501c3	10,000				Sponsorship
Teddy Bear Den 500 S Main Ave Sioux Falls, SD 57104	31-1802800	501c3	8,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
United Way & Volunteer Services of Greater Yankton 610 W 23rd St Ste 11 Yankton, SD 57078	46-0252854	501c3	12,240				Sponsorship
United Way of Northeastern SD Inc PO Box 1065 Aberdeen, SD 57401	23-7086355	501c3	15,759				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
United Way of Southwest MN PO Box 41 Marshall, MN 56258	41-6023143	501c3	5,253				Sponsorship
University of Sioux Falls 1101 W 22nd St Sioux Falls, SD 57105	46-0224600	501c3	400,000				Scholarship; Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
USD Foundation 1110 N Dakota St Vermillion, SD 57069	46-6018891	501c3	354,100				Sponsorship
Vision Brookings Foundation 2301 Research Park Way Ste 113 Brookings, SD 57006	46-0440746	501c6	20,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Volunteers of America Dakotas PO Box 89306 Sioux Falls, SD 571099306	23-7353508	501c3	15,000				Sponsorship
Washington Pavilion 301 S Main Ave Sioux Falls, SD 57104	46-0435791	501c3	75,763				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
WGB Management LLC (SF Skedaddle) 124 S Phillips Ave Sioux Falls, SD 57104	84-4114013		15,000				Sponsorship
Yankton Area Arts Association 508 Douglas Yankton, SD 57078	51-0172432	501c3	5,500				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Yankton Area Progressive Growth 803 E 4th St Yankton, SD 57078	46-0348636	501c6	60,000				Sponsorship
Yankton School District 63-3 2410 W City Limits Rd Yankton, SD 57078	46-6003280	City of Yankton	10,000				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Yankton Thrive Inc 803 E 4th St Yankton, SD 57078	46-0348636	501c6	60,000				Sponsorship
Avera McKennan 1325 S Cliff Ave PO Box 5045 Sioux Falls, SD 57117	46-0224743	501c3	100,001				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Avera St Mary's 801 East Sioux Avenue Pierre, SD 57501	46-0230199	501c3	14,310				Sponsorship
Avera St Luke's 305 South State Street Aberdeen, SD 57401	46-0224598	501c3	18,600				Sponsorship

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Avera Marshall 300 S Bruce Street Marshall, MN 56258	41-0919153	501c3	15,900				Sponsorship

Schedule J (Form 990)	Compensation Information	OMB No. 1545-0047
		2020
		Open to Public Inspection
Department of the Treasury Internal Revenue Service	For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23. ▶ Attach to Form 990. ▶ Go to www.irs.gov/Form990 for instructions and the latest information.	
Name of the organization Avera Health		Employer identification number 46-0422673

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 on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.			
☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
☐ Travel for companions	☐ Payments for business use of personal residence		
☐ Tax idemnification and gross-up payments	☐ Health or social club dues or initiation fees		
☐ Discretionary spending account	☐ Personal services (e.g., maid, chauffeur, chef)		
b If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain		1b	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?		2	
3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.			
☒ Compensation committee	☐ Written employment contract		
☒ Independent compensation consultant	☒ Compensation survey or study		
☐ Form 990 of other organizations	☒ Approval by the board or compensation committee		
4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:			
a Receive a severance payment or change-of-control payment?		4a	Yes
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), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a The organization?		5a	No
b Any related organization?		5b	No
If "Yes," on line 5a or 5b, describe in Part III.			
6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a The organization?		6a	No
b Any related organization?		6b	No
If "Yes," on line 6a or 6b, describe in Part III.			
7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.		7	Yes
8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.		8	No
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?		9	

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

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

[illegible]

Part III **Supplemental Information**

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

Return Reference	Explanation
Part I, Line 4a	Richard Molseed received a severance payment of \$1,413,802.80, James Veline received a severance payment of \$673,519.20, and Robin Bates received a severance payment of \$515,595.60.
Part I, Line 7	During the current year, the organization paid certain executives incentive payments related to COVID and also paid some physician retention payments to certain physicians.

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1Bob Sutton President/CEO	(i)	1,647,459	91,108	10,812	14,250	37,670	1,801,299	0
	(ii)	0	0	0	0	0	0	0
1Richard Molseed Exec VP - Governance & Strategy	(i)	334,204	0	1,437,428	14,250	10,071	1,795,953	0
	(ii)	0	0	0	0	0	0	0
2David Flicek Pres/CEO - Avera McKennan	(i)	1,191,662	62,652	21,550	14,250	30,842	1,320,956	0
	(ii)	0	0	0	0	0	0	0
3James Veline - Senior Vice Pres - Chief Information Officer	(i)	394,644	0	691,980	14,250	6,126	1,107,000	0
	(ii)	0	0	0	0	0	0	0
4David Erickson Chief Medical/Innovation Officer	(i)	824,656	46,065	34,909	14,250	30,546	950,426	0
	(ii)	0	0	0	0	0	0	0
5Julie Laultt CFO Avera Health; Sec/Treas	(i)	842,009	55,127	6,409	14,250	22,128	939,923	0
	(ii)	0	0	0	0	0	0	0
6Robin Bates - Executive VP Insurance Svcs & Population	(i)	347,690	2,500	530,795	14,250	12,696	907,931	0
	(ii)	0	0	0	0	0	0	0
7Dr Luis Rojas-Espaillet Director	(i)	0	0	0	0	0	0	0
	(ii)	685,273	25,500	49,132	14,250	34,574	808,729	0
8Richard Korman Senior VP - General Counsel	(i)	683,510	37,839	11,233	14,250	37,805	784,637	0
	(ii)	0	0	0	0	0	0	0
9Todd Forkel Pres/CEO - Avera St. Luke's	(i)	685,402	35,420	7,537	8,174	33,975	770,508	0
	(ii)	0	0	0	0	0	0	0
10Doug Ekeren President/CEO -Sacred Heart	(i)	587,258	28,842	10,656	14,250	26,426	667,432	0
	(ii)	0	0	0	0	0	0	0
11Tom Clark Chief Strategy & Growth Officer	(i)	547,808	26,164	13,893	14,250	30,842	632,957	0
	(ii)	0	0	0	0	0	0	0
12Deanna Larson CEO - eCare	(i)	403,627	21,450	19,597	14,250	25,926	484,850	0
	(ii)	0	0	0	0	0	0	0
13Dr Jason Wickersham Director	(i)	0	0	0	0	0	0	0
	(ii)	297,119	108,278	1,525	14,250	31,274	452,446	0
14Jim Breckenridge Former CFO Avera Health; Sec/Treas	(i)	299,918	0	29,330	7,703	7,964	344,915	0
	(ii)	0	0	0	0	0	0	0

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

Schedule K
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
Avera Health

Supplemental Information on Tax-Exempt Bonds

► Complete if the organization answered "Yes" to Form 990, Part VI, line 24a. Provide descriptions, explanations, and any additional information in Part VI.
► Attach to Form 990.
► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Employer identification number
46-0422673

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 South Dakota Health and Educational Facilities Authority	46-0315509	83755VUS1	05-01-2012	206,383,927	Series 2012B refunded 2002 and 2008A bonds issued 4/11/02 and 6/18/08		X		X		X
B South Dakota Health and Educational Facilities Authority	46-0315509	83755VVY7	06-26-2014	61,821,688	Series 2014A Various capital projects		X		X		X
C South Dakota Health and Educational Facilities Authority	46-0315509	83755VG99	10-11-2017	242,848,916	Series 2017 refunded bond issued 6/18/08;const/equip healthcare facilities		X		X		X
D South Dakota Health and Educational Facilities Authority	46-0315509	83755VJ54	11-13-2019	50,276,218	Series 2019A refunded bond issued 4/3/2017		X		X		X

Part II		Proceeds							
		A		B		C		D	
1	Amount of bonds retired	97,153,927				20,433,916			
2	Amount of bonds legally defeased								
3	Total proceeds of issue	206,383,927		61,821,688		242,848,916		50,276,218	
4	Gross proceeds in reserve funds								
5	Capitalized interest from proceeds								
6	Proceeds in refunding escrows								
7	Issuance costs from proceeds	1,032,422		821,688		1,786,422			
8	Credit enhancement from proceeds								
9	Working capital expenditures from proceeds								
10	Capital expenditures from proceeds	38,100,000		61,000,000		190,000,000			
11	Other spent proceeds	167,251,505				51,062,494		50,276,218	
12	Other unspent proceeds								
13	Year of substantial completion	2013		2015					
		Yes	No	Yes	No	Yes	No	Yes	No
14	Were the bonds issued as part of a current refunding issue of tax-exempt bonds (or, if issued prior to 2019, a current refunding issue)?	X			X		X		X
15	Were the bonds issued as part of an advance refunding issue of taxable bonds (or, if issued prior to 2019, an advance refunding issue)?		X		X	X		X	
16	Has the final allocation of proceeds been made?	X		X		X		X	
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X		X		X		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		X		X		X
2	Are there any lease arrangements that may result in private business use of bond-financed property?	X			X		X		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 of bond-financed property?	X			X		X		X
b	If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?		X						
c	Are there any research agreements that may result in private business use of bond-financed property?		X		X		X		X
d	If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?								
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	0 %		0 %		0 %		0 %	
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	0 %		0 %		0 %		0 %	
6	Total of lines 4 and 5	0 %		0 %		0 %		0 %	
7	Does the bond issue meet the private security or payment test? . . .		X		X		X		X
8a	Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued?		X		X		X		X
b	If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of. . .								
c	If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?								
9	Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?	X		X		X		X	

Part IV Arbitrage		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate?		X		X		X		X
2	If "No" to line 1, did the following apply?								
a	Rebate not due yet?		X		X		X		X
b	Exception to rebate?		X		X		X		X
c	No rebate due?	X		X			X		X
	If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed								
3	Is the bond issue a variable rate issue?	X			X		X		X
4a	Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?		X		X		X		X
b	Name of provider								
c	Term of hedge								
d	Was the hedge superintegrated?								
e	Was the hedge terminated?								

Part IV Arbitrage (Continued)

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
5a Were gross proceeds invested in a guaranteed investment contract (GIC)?		X		X		X		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?								
6 Were any gross proceeds invested beyond an available temporary period?		X		X		X		X
7 Has the organization established written procedures to monitor the requirements of section 148?	X		X		X		X	

Part V Procedures To Undertake Corrective Action

	A		B		C		D	
	Yes	No	Yes	No	Yes	No	Yes	No
Has the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations?	X		X		X		X	

Part VI Supplemental Information. Provide additional information for responses to questions on Schedule K. (See instructions).

Return Reference	Explanation
Date Rebate Computation Performed	Issuer Name: South Dakota Health and Educational Facilities Authority Date the Rebate Computation was Performed: 06/30/2021 Issuer Name: South Dakota Health and Educational Facilities Authority Date the Rebate Computation was Performed: 06/30/2021

Return Reference	Explanation
Schedule K, Part IV, Line 2C:	The arbitrage analysis is performed annually, therefore the analysis was completed as of June 30, 2021 for Bonds A and B.

Schedule L

(Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Transactions with Interested Persons

▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Avera Health

Employer identification number
46-0422673

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and section 501(c)(29) organizations only).
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958. ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$

Part II Loans to and/or From Interested Persons.
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No

Total ▶ \$

Part III Grants or Assistance Benefiting Interested Persons.
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) Interstates Office Products Inc	Owned by board member, Gary Gaspar	254,833	Office product purchases		No
(2) Katherine Schild	Family member of Key Employee, Doug Ekeren	87,000	Compensation and benefits as an employee		No
(3) Laura Alexander	Family member of Key Employee, Doug Ekeren	42,740	Compensation and benefits as an employee		No

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

Return Reference	Explanation
------------------	-------------

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions
▶Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
▶ Attach to Form 990.
▶Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Avera Health

Employer identification number
46-0422673

Part I

Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	3	1,142,309	Avg of high/low
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies	X	6	128,210	FMV
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ See Additional Data				
26 Other ▶ ()				
27 Other ▶ ()				
28 Other ▶ ()				

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

29

0

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?

Yes

No

30a

No

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

Yes

No

31

Yes

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

Yes

No

32a

No

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.

Part II Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference	Explanation
Part I, Column (b):	The organization is reporting in Part I, column (b) the number of contributions.
Part I, Line 33:	Amounts included in revenue for the financial statement reporting are included on Schedule M. Additional non-cash contributions not included on Schedule M and the financial statements include items for the benefit of the Avera facilities which include special event donations.

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Part I, Lines 25-28

Other ▶ (Windows, millwork, siding, shingles, lumber)
Other ▶ (Furniture and flooring)
Other ▶ (Fireplace; Patio furniture; privacy fence)
Other ▶ (Mowers)
Other ▶ (Auction items)
Other ▶ (Items for patients and residents)
Other ▶ (Fountain)

(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
X	1	200,000	Cost
X	1	116,028	Cost
X	1	58,593	Cost
X	6	56,232	Cost
X	2	16,000	FMV
X	8	14,903	Cost
X	1	3,000	Cost

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Name of the organization
Avera Health

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

2020

Open to Public Inspection

Employer identification number

46-0422673

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI	Jim Breckenridge, Julie Lautt, Dr. Luis Rojas-Espallat, Dr. Jason Wickersham, and Dr. Merritt Gregg Warren had a business relationship.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 6	Avera Health has two classes of members: Sponsorship Members and System Members. Sponsorship Members shall consist collectively of (i) those persons serving from time to time as the President and Council of the Presentation Sisters of the Blessed Virgin Mary of Aberdeen, South Dakota and (ii) those persons serving from time to time as the Prioress and Council of the Benedictine Convent of the Sacred Heart (Yankton, S.D.). System Members shall consist of six Sisters- three Presentation Sisters appointed by the Presentation Sponsorship Members and three Benedictine Sisters appointed by the Benedictine Sponsorship Members.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 7a	The System Members have the power to appoint the Board of Directors of Avera Health and to suspend or remove a Director at any time, with or without cause. They also have the power to appoint a Benedictine Sister, Presentation Sister, or a Ministerial Juridic Person to the Boards of Directors of any sponsored work or ministry of Avera Health.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 7b	The following powers shall be reserved to and exercised exclusively by the Sponsorship Members and none of the following actions shall be taken by Avera Health without action of the Sponsorship Members: (a) To approve the adoption, amendment or repeal of the statements of philosophy, mission, Guiding Principles and values of Avera Health; (b) To initiate the adoption, amendment or repeal of any provision of the Articles of Incorporation or Bylaws of Avera Health, and to give final approval of any such action with respect thereto; (c) To establish policies regarding the alienation of real property and precious artifacts associated with the healthcare ministry which are under the canonical stewardship of the Presentation Sisters or the Benedictine Sisters; (d) To approve any plan of merger, consolidation or dissolution of Avera Health, or the divestiture of any sponsored work or ministry associated with Avera Health; (e) To change the composition of the Sponsorship Members, including the addition of other individuals, parties or entities to be Sponsorship Members; and (f) To approve the creation of new sponsored works or ministries to be conducted by or under the authority of Avera Health. The following powers shall be reserved to and exercised exclusively by the System Members and none of the following actions shall be taken by Avera Health without action of the System Members: (a) To appoint the Board of Directors of Avera Health and to suspend or remove a Director at any time, with or without cause; (b) To appoint a Presentation Sister, a Benedictine Sister, or a Ministerial Juridic Person to the Boards of Directors of any sponsored work or ministry of Avera Health; (c) To appoint the Chair and Vice Chair of the Board of Directors; (d) To appoint, evaluate, suspend or remove the Avera Health President; (e) To review and approve expenditures outside of the annual operating and capital budgets, for Avera Health in accordance with established Avera Health fiscal policies; (f) To review and approve the Avera Health Strategic Plan; (g) To review and approve any and all Rescript Applications on behalf of Avera Health; (h) To adopt procedures for assuring that corporate actions are consistent with the philosophy, mission, Guiding Principles and values of Avera Health; (i) To provide recommendations to the Sponsorship Members on matters requiring Sponsorship Members' approval or action; (j) To adopt policies designed to effectuate the powers reserved to the System Members; and (k) To exercise oversight of the Guiding Principles and such authorities which may be assigned or delegated by the Sponsorship Members.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 8b	Avera Health does not have any committees with authority to act on behalf of the governing body.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 11b	The Form 990 is reviewed by the VP of Financial Reporting, Tax Manager, and Finance Committee (if applicable). After initial review the Form 990 is made available to the Board and other Operation Finance Leaders. In FY2021, the board was provided a copy of the return with the name of a donor who wished to remain anonymous removed from Schedule B. All other aspects of the return as provided to the board mirrored the return as filed with the IRS.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 12c	The conflict of interest policy covers board members, officers and key employees. At each board meeting, a request is made for all board members to disclose any potential conflict of interest pertaining to any item listed on the agenda or pertaining to any potential item that could be discussed during the course of the meeting. The declaration of conflict of interest is recorded in the meeting minutes. The board makes a determination of whether there is a conflict of interest and if so, implements the procedure for evaluating the issue or transaction involved. The board member or officer with the conflict must refrain from voting. A statement of conflict of interest disclosure is made on an annual basis by officers and directors. The information is maintained in a database and a report is provided to the board.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 15	Annually the Compensation Committee of Avera Health, which is comprised of six (6) system members appointed by the religious orders, meets with an independent consultant regarding fair market value for compensation of officers and key employees. The Compensation Committee approves all salaries based on comparable data and documents the basis for their decision in meeting minutes.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section C, line 19	The Organization's governing documents, conflict of interest policy, and financial statements are not made available to the general public.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, Line 16b:	There is no written policy or procedure. In the event of any such proposed transaction, the board or a committee with delegated authority reviews all materials, valuations and operational aspects for any proposed transaction. Such transaction would be evaluated in accordance with the exempt status of the organization and its applicable purposes. Any transaction also would be approved by the board and the member.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part IX, line 11g	Purchased services: Program service expenses 15,283,846. Management and general expenses 976,658. Fundraising expenses 74,133. Total expenses 16,334,637. Contract labor: Program service expenses 11,677,008. Management and general expenses 385,516. Fundraising expenses 0. Total expenses 12,062,524. Recruitment: Program service expenses 292,749. Management and general expenses 88,647. Fundraising expenses 0. Total expenses 381,396. Consulting fees: Program service expenses 2,227,132. Management and general expenses 2,231,795. Fundraising expenses 11,401. Total expenses 4,470,328. Medical Director fees: Program service expenses 144,799. Management and general expenses 0. Fundraising expenses 0. Total expenses 144,799. Management fees: Program service expenses 890,235. Management and general expenses 0. Fundraising expenses 0. Total expenses 890,235.

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part X, Line 20:	The issue price includes the filing Organization's share of the entire bond issue, which was issued to Avera Health on behalf of the Avera Obligated Group. The Avera Obligated Group consists of Avera Health, Avera McKennan, Avera St. Luke's, Avera Queen of Peace, Avera Sacred Heart, Avera Marshall, Avera St. Mary's, Avera St. Anthony's, Avera St. Benedict, Avera Holy Family, Avera Tyler, Avera Granite Falls, Avera Gettysburg and Avera at Home. In accordance with IRS instructions, information related to the tax exempt bond reporting is being reported on Avera Health's tax return (EIN 46-0422673).

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XI, line 9:	Net equity transfers 9,370,574. Other changes in net assets -1,730,234. Contributions received by Avera Health Foundation not reflected in financial statements -15,944,168. Net assets released from restrictions 844,144. Grants to organizations distributed by Avera Health Foundation not reflected in financial statements 12,655,824.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

► Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
► Attach to Form 990.
► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
Avera Health

Employer identification number
46-0422673

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

(a) Name, address, and EIN (if applicable) 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
(1) Avel eCare LLC 3900 West Avera Drive Sioux Falls, SD 571085721	Telehealth	SD	26,129,177	14,906,477	Avera Health
(2) Avel Research and Education LLC 3900 West Avera Drive Sioux Falls, SD 571085721	Telehealth education	SD	0	495,182	Avera Health

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.

See Additional Data Table

(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 entity?	
						Yes	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.

See Additional Data Table

(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) Disproportionate 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	(i) Section 512(b) (13) controlled entity?	
								Yes	No
(1) Accounts Management Inc 5132 S Cliff Ave Suite 101 Sioux Falls, SD 57108 46-0373021	Collection agency	SD	Avera Health	C	3,184,615	3,041,663	75.000 %	Yes	
(2) Avera Property Insurance Inc 1000 West 4th Street Suite 1 Yankton, SD 57078 46-0463155	Insurance	SD	Avera Health	C	964,061	1,346,422	100.000 %	Yes	
(3) Valley Health Services 501 Summit Street Yankton, SD 57078 46-0357149	Rental real estate	SD	Sacred Heart Health Services	C	205,477	1,419,106	100.000 %	Yes	
(4) Alucent Biomedical Inc 1325 S Cliff Avenue PO Box 5045 Sioux Falls, SD 571175045 47-1818349	Biotech Research	SD	Alumend LLC	C	22,990	35,115,239	100.000 %	Yes	
(5) South Dakota State Medical Holding Company Inc 5300 South Broadband Lane Sioux Falls, SD 57108 46-0401087	Insurance	SD	Avera Health	C	35,046,731	24,734,794	100.000 %	Yes	
(6) DakotaCare Administrative Services Inc 5300 South Broadband Lane Sioux Falls, SD 57108 46-0424322	Insurance	SD	Avera Health	C	8,553,679	13,044,420	100.000 %	Yes	

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

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

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, or **(iv)** rent from a controlled entity

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

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

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

e Loans or loan guarantees by related organization(s)

f Dividends from related organization(s)

g Sale of assets to related organization(s)

h Purchase of assets from related organization(s)

i Exchange of assets with related organization(s)

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

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

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

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

n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)

o Sharing of paid employees with related organization(s)

p Reimbursement paid to related organization(s) for expenses

q Reimbursement paid by related organization(s) for expenses

r Other transfer of cash or property to related organization(s)

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

Yes

No

1a

No

1b

Yes

1c

No

1d

No

1e

No

1f

No

1g

No

1h

No

1i

Yes

1j

No

1k

Yes

1l

Yes

1m

Yes

1n

No

1o

Yes

1p

Yes

1q

Yes

1r

Yes

1s

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.

See Additional Data Table

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved

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**

Provide additional information for responses to questions on Schedule R. (see instructions).

Return Reference	Explanation
Schedule R, Part III:	Q&M Properties, LLC dissolved effective June 30, 2021. National Rural ACO 4 LLC liquidated effective December 31, 2020.

Return Reference	Explanation
Schedule R, Part I:	The name Avera eCare, LLC changed to Avel eCare, LLC effective November 17, 2020.

Additional Data

Software ID:
Software Version:
EIN: 46-0422673
Name: Avera Health

Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512 (b)(13) controlled entity?	
						Yes	No
300 N 2nd Street ONeill, NE 68763 47-0463911	Healthcare services	NE	501(c)(3)	Line 3	Avera Health	Yes	
826 North 8th Street Estherville, IA 51334 42-0680370	Healthcare services	IA	501(c)(3)	Line 3	Avera Health	Yes	
826 North 8th Street Estherville, IA 51334 42-1317452	Support health related services	IA	501(c)(3)	Line 10	Avera Holy Family	Yes	
401 West Glynn Drive Parkston, SD 57366 46-0226738	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
West Glynn Drive PO Box B Parkston, SD 57366 46-0458725	Support health related services	SD	501(c)(3)	Line 12a, I	St Benedict Health Center	Yes	
1325 S Cliff Ave PO Box 5045 Sioux Falls, SD 57117 46-0224743	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
525 North Foster Mitchell, SD 57301 46-0224604	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
501 Summit Street Yankton, SD 57078 46-0225483	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
606 East Garfield Gettysburg, SD 57442 46-0234354	Healthcare services	SD	501(c)(3)	Line 3	Avera St Mary's	Yes	
5116 S Solberg Ave Sioux Falls, SD 57108 46-0399291	Home services	SD	501(c)(3)	Line 10	Avera Health	Yes	
1000 W 4th Street Suite 9 Yankton, SD 57078 46-0337013	Healthcare education	SD	501(c)(3)	Line 10	Sacred Heart Health Services	Yes	
305 South State Street Aberdeen, SD 57401 46-0224598	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
801 East Sioux Avenue Pierre, SD 57501 46-0230199	Healthcare services	SD	501(c)(3)	Line 3	Avera Health	Yes	
300 S Bruce Street Marshall, MN 56258 41-0919153	Healthcare services	MN	501(c)(3)	Line 3	Avera Health	Yes	
240 Willow Street Tyler, MN 56178 41-0853163	Healthcare services	MN	501(c)(3)	Line 3	Avera Marshall	Yes	
3900 West Avera Drive Suite 101 Sioux Falls, SD 57108 46-0451539	Health financing & health plan admin	SD	501(c)(4)		Avera Health	Yes	
345 10th Ave Granite Falls, MN 56241 84-3156881	Healthcare services	MN	501(c)(3)	Line 3	Avera Marshall		No

Form 990, Schedule R, Part III - Identification of Related Organizations Taxable as a Partnership												
(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal Domicile (State or Foreign Country)	(d) Direct Controlling Entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end- of-year assets	(h) Disproprtionate 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	
Avera Home Medical Equipment of Floyd Valley Hospital LLC 714 Lincoln St NE Lemars, IA 51031 82-0582350	Medical services - home medical equipment	SD	N/A					No			No	
Avera Home Medical Equipment of Sioux Center LLC 38 19th St SW Sioux Center, IA 51250 75-3203100	Medical services - home medical equipment	SD	N/A					No			No	
Q&M Properties LLC 525 North Foster Mitchell, SD 57301 73-1652049	Medical clinic building	SD	N/A					No			No	
Surgical Associates Endoscopy Clinic LLC 310 S Penn Aberdeen, SD 57401 46-0461429	Surgical associates	SD	N/A					No			No	
Avera Home Medical Equipment of Spencer Hospital LLC 2400 S Minnesota Ave Sioux Falls, SD 57117 80-0619999	Medical Services - home medical equipment	SD	N/A					No			No	
Heart Hospital of South Dakota LLC 4500 W 69th Street Sioux Falls, SD 57108 56-2143771	Healthcare Services	SD	N/A					No			No	
Brookings Health System - Avera HME LLC 101 22nd Ave Suite 101 Brookings, SD 57006 45-3204123	Healthcare Services	SD	N/A					No			No	
National Rural ACO 4 LLC dba Prairie Hills Care Organization 7509 NW Tiffany Springs Parkway Kansas City, MO 64153 37-1780735	Accountable Care Organization	KS	N/A					No			No	
National Rural ACO 5 LLC dba Great Plains Care Organization 7509 NW Tiffany Springs Parkway Kansas City, MO 64153 38-3958290	Accountable Care Organization	KS	N/A					No			No	
Caravan Health ACO 41 LLC dba Prairie View Care Organization 7509 NW Tiffany Springs Parkway Kansas City, MO 64153 82-1447782	Accountable Care Organization	KS	N/A					No			No	

Form 990, Schedule R, Part V - Transactions With Related Organizations

(a) Name of related organization	(b) Transaction type(a-s)	(c) Amount Involved	(d) Method of determining amount involved
Accounts Management Inc	L	435,780	General Ledger
Avera At Home	L	3,746,244	General Ledger
Avera Health Plans Inc	L	624,564	General Ledger
Avera Marshall	L	11,290,860	General Ledger
Avera McKennan	L	124,034,028	General Ledger
Avera Queen Of Peace Hospital	L	13,546,344	General Ledger
Avera Sacred Heart Health Services	L	17,068,596	General Ledger
Avera St Luke's	L	19,881,540	General Ledger
Avera St Mary's	L	9,621,516	General Ledger
Avera McKennan	K	1,165,813	Vendor Payment Listing
Avera Sacred Heart Health Services	K	87,775	Vendor Payment Listing
Avera Health Plans Inc	P	16,634,735	Vendor Payment Listing
Avera Marshall	P	525,424	Vendor Payment Listing
Avera McKennan	P	13,758,085	Vendor Payment Listing
Avera Queen Of Peace Hospital	P	280,185	Vendor Payment Listing
Avera Sacred Heart Health Services	P	393,125	Vendor Payment Listing
Avera St Luke's	P	232,379	Vendor Payment Listing
Avera St Mary's	P	88,856	Vendor Payment Listing
Accounts Management Inc	Q	64,401	Customer Invoice Listing
Avera At Home	Q	743,363	Customer Invoice Listing
Avera Health Plans Inc	Q	835,122	Customer Invoice Listing
Avera Holy Family	Q	767,224	Customer Invoice Listing
Avera Marshall	Q	2,659,493	Customer Invoice Listing
Avera McKennan	Q	39,754,417	Customer Invoice Listing
Avera Queen Of Peace Hospital	Q	4,254,554	Customer Invoice Listing

Form 990, Schedule R, Part V - Transactions With Related Organizations

(a) Name of related organization	(b) Transaction type(a-s)	(c) Amount Involved	(d) Method of determining amount involved
Avera Sacred Heart Health Services	Q	4,361,667	Customer Invoice Listing
Avera St Anthony's Hospital	Q	934,524	Customer Invoice Listing
Avera St Luke's	Q	6,579,390	Customer Invoice Listing
Avera St Mary's	Q	2,784,163	Customer Invoice Listing
St Benedict Health Center	Q	632,681	Customer Invoice Listing
Avera At Home	R	323,217	General Ledger
Avera Holy Family	R	67,332	General Ledger
Avera Marshall	R	180,867	General Ledger
Avera McKennan	R	1,575,567	General Ledger
Avera Queen Of Peace Hospital	R	168,878	General Ledger
Avera Sacred Heart Health Services	R	322,091	General Ledger
Avera St Luke's	R	99,205	General Ledger
Avera St Mary's	R	5,526,801	General Ledger
St Benedict Health Center	R	60,270	General Ledger
Avera McKennan	B	100,001	General Ledger