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Department of the Treasury

Internal Revenue Service

Return of Organization Exempt From Income Tax

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

OMB No. 1545-0047 Open to Public

Do not enter social security numbers on this form as it may be made public. ► Information about Form 990 and its instructions is at www.irs.gov/form990.

and ending

Inspection

A For the 2014 calendar year, or tax year beginning Check if applicable: C Name of organization D Employer identification number Address change ON THE RISE, INC. Name change 04 - 3290689Doing business as Initial return Number and street (or P.O. box if mail is not delivered to street address) E Telephone number Final return/ 497-7968 341 BROADWAY (617)termin-ated 1,635,917. City or town, state or province, country, and ZIP or foreign postal code **G** Gross receipts \$ Amended return CAMBRIDGE, MA 02139 H(a) Is this a group return Applica-F Name and address of principal officer: MARTHA SANDLER Yes X No for subordinates? pending SAME AS C ABOVE H(b) Are all subordinates included? Yes No Tax-exempt status: X 501(c)(3) 501(c) ( ) ◀ (insert no.) 4947(a)(1) or If "No," attach a list. (see instructions) J Website: ► WWW.ONTHERISE.ORG **H(c)** Group exemption number ▶ K Form of organization: X Corporation Association Other > L Year of formation: 1995 M State of legal domicile: MA Part I Summary Briefly describe the organization's mission or most significant activities: ON THE RISE CREATES A COMMUNITY Activities & Governance WHERE WOMEN HAVE THE RELATIONSHIPS, SAFETY AND RESOURCES THEY NEED Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets. 13 Number of voting members of the governing body (Part VI, line 1a) <del>13</del> Number of independent voting members of the governing body (Part VI, line 1b) 19 5 Total number of individuals employed in calendar year 2014 (Part V, line 2a) 260 6 Total number of volunteers (estimate if necessary) 7 a Total unrelated business revenue from Part VIII, column (C), line 12 7a **b** Net unrelated business taxable income from Form 990-T, line 34 ..... 7b **Prior Year Current Year** 1,063,055.  $1,001,\overline{970}$ Contributions and grants (Part VIII, line 1h) Revenue 0. 0. Program service revenue (Part VIII, line 2g) 75,059. 39,877. Investment income (Part VIII, column (A), lines 3, 4, and 7d) 10 16,448. 16,854. Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 1,119,786. 1,093,477. Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) ........ 61,494. 48,492. Grants and similar amounts paid (Part IX, column (A), lines 1-3) 0. 0. Benefits paid to or for members (Part IX, column (A), line 4) 724,344. 712,740.Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) Expenses 16a Professional fundraising fees (Part IX, column (A), line 11e) **b** Total fundraising expenses (Part IX, column (D), line 25) 222,550. 231,809. Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 1,008,388. 993,041. Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 111,398. 100,436. Revenue less expenses. Subtract line 18 from line 12 **Beginning of Current Year End of Year** 2,475,970. 2,410,618. 20 Total assets (Part X, line 16) 42,473. 42,777. 21 Total liabilities (Part X, line 26) 368,145. 2,433,193. 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. Signature of officer Date Sign MARTHA SANDLER, EXECUTIVE DIRECTOR/PRESIDENT Here Type or print name and title PTIN Print/Type preparer's name Preparer's signature if self-employed MAUREEN L. SULLIVAN, CPA 05/13/15 P00296843 Paid Firm's name SMITH, SULLIVAN & BROWN, P.C. 43-1985162 Preparer Firm's EIN ▶ Firm's address 80 FLANDERS ROAD - SUITE #200 Use Only WESTBOROUGH, MA 01581 Phone no. (508) 871-7178 X Yes No May the IRS discuss this return with the preparer shown above? (see instructions)

| Pai | rt III Statement of Program Service Accomplishments   | 37   |
|-----|---|------|
|     |   | X    |
| 1   | Briefly describe the organization's mission: ON THE RISE CREATES A COMMUNITY WHERE WOMEN HAVE THE   |      |
|     | RELATIONSHIPS, SAFETY AND RESOURCES THEY NEED TO MOVE OUT OF  |      |
|     | HOMELESSNESS. WE ENGAGE WITH THOSE MOST IN NEED AND SUPPORT THEIR   |      |
|     | INITIATIVE AND STRENGTH AS THEY MOVE BEYOND CRISIS AND DISCOVER NEW   |      |
|     |   |      |
| 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 X                             |      |
|     |   | NO   |
| •   | If "Yes," describe these new services on Schedule O.  Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes X |      |
| 3   | 3, 3, 3, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,   | 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 \$610 , 323 . including grants of \$48 , 492 . ) (Revenue \$  | )    |
|     | KEEP THE KEYS/SAFE HAVEN PROGRAM:   |      |
|     | OMD A CODE DECEDIMENTA DECLINES MANGEDLE ATE AND LONG MEDIC DECAD DAGE  | - T  |
|     | OTR'S CORE PROGRAMMING PROVIDES TANGIBLE AID AND LONG-TERM, BROAD-BASE  | תק   |
|     | SUPPORT TO WOMEN, STARTING WHEN THEY ARE HOMELESS OR IN CRISIS.   |      |
|     |   |      |
|     | SAFE HAVEN:   |      |
|     | MUDOUGU GONDDUUDUGIUD DAVMIND DIDDGM GDDUIGHG OMD DNGAGDG AND ANNUALL   | - 37 |
|     | THROUGH COMPREHENSIVE DAYTIME DIRECT SERVICES, OTR ENGAGES AND ANNUALL  | 7 X  |
|     | ASSISTS APPROXIMATELY 400 SEVERELY DISENFRANCHISED WOMEN, PROVIDING   |      |
|     | EMOTIONAL, PRACTICAL, AND PROFESSIONAL SUPPORT THAT HELPS THE WOMEN   |      |
|     | ACHIEVE AND SUSTAIN EXTRAORDINARY ACCOMPLISHMENTS - FROM IMPROVING  | _    |
|     | HEALTH, TO GETTING JOBS, TO FINDING HOUSING. THE GOALS OF THE PROGRAM   | 1    |
| 4b  | (Code:) (Expenses \$137,085 • including grants of \$) (Revenue \$)  | )    |
|     | THE COMMUNITY OUTREACH AND EDUCATION PROGRAM:   |      |
|     | INTEGRAL TO OTR'S MISSION IS ITS RESPONSIBILITY TO RAISE AWARENESS AND  | _    |
|     | FACILITATE PUBLIC DISCOURSE ABOUT THE MOST VEXING SOCIAL ISSUES THAT  |      |
|     | AFFECT THE WOMEN WHO PARTICIPATE IN OTR'S PROGRAMS. THROUGH THE   |      |
|     | COMMUNITY OUTREACH AND EDUCATION PROGRAM, OTR INFORMS THE BROADER   |      |
|     | COMMUNITY ABOUT THE INTERPLAY OF HOMELESSNESS, TRAUMA, MENTAL ILLNESS,  |      |
|     | ADDICTION, AND DOMESTIC VIOLENCE, AND HELPS INDIVIDUALS AND GROUPS  | /    |
|     | PARTICIPATE IN CREATING A SAFE, SUPPORTIVE SPACE FOR WOMEN AS THEY  |      |
|     | REINTEGRATE BACK INTO THE COMMUNITY.  |      |
|     | REINIEGRATE DACK INTO THE COMMONITY:  |      |
|     |   |      |
| 4c  | (Code:) (Expenses \$  |      |
| +0  | (Code) (expenses \$   | — ′  |
|     |   |      |
|     |   |      |
|     |   |      |
|     |   |      |
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|     |   |      |
|     |   |      |
|     |   |      |
| 4d  | Other program services (Describe in Schedule O.)  |      |
|     | (Expenses \$ including grants of \$ ) (Revenue \$ )   |      |
| 4e  | Total program service expenses 747,408.   |      |
|     | Form 990 (2   | 2014 |

# 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          | X   |               |
| 2        | Is the organization required to complete Schedule B, Schedule of Contributors?  | 2          | X   |               |
| 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          |     | X             |
| 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          |     | X             |
| 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          |     | X             |
| 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          |     | Х             |
| 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          |     | Х             |
| 8        | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete  |            |     |               |
|          | Schedule D, Part III  | 8          |     | Х             |
| 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          |     | Х             |
| 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         |     | Х             |
| 11       | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VIII, IX, or X   |            |     |               |
|          | as applicable.  |            |     |               |
| а        | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,   |            |     |               |
|          | Part VI   | 11a        | X   |               |
| 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        |     | х             |
| С        | 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        |     | х             |
| 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        |     | х             |
| ۵        | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X   | 11e        |     | х             |
| 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        | Х   |               |
| 12a      | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete   |            |     |               |
|          | Schedule D, Parts XI and XII  | 12a        | Х   |               |
| 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        |     | х             |
| 13       | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E   | 13         |     | X             |
| 14a      | Did the organization maintain an office, employees, or agents outside of the United States?   | 14a        |     | X             |
|          | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,   | u          |     |               |
| -        | 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        |     | х             |
| 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   | 175        |     |               |
|          | foreign organization? If "Yes," complete Schedule F, Parts II and IV  | 15         |     | х             |
| 16       | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to  | 13         |     |               |
|          | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV   | 16         |     | х             |
| 17       | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,   | 10         |     |               |
| .,       | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I  | 17         |     | х             |
| 18       | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines  | ''         |     | <del></del> - |
| 10       |   | 18         | Х   |               |
| 10       | 1c and 8a? If "Yes," complete Schedule G, Part II  Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," | 10         |     | <u> </u>      |
| 19       |   | 40         |     | x             |
| 20-      | complete Schedule G, Part III  Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H  | 19         |     | X             |
|          |   | 20a<br>20b |     | <u> </u>      |
| <u> </u> | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?  |            | 000 | (001.4)       |

# Part IV Checklist of Required Schedules (continued)

|                  |   |            | Yes | No          |
|------------------|---|------------|-----|-------------|
| 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         |     | Х           |
| 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         | Х   |             |
| 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  |            |     | X           |
|                  | Schedule J  | 23         |     |             |
| 2 <del>4</del> a | 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  | 240        |     | x           |
| <b>h</b>         | Schedule K. If "No", go to line 25a  Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?  | 24a<br>24b |     |             |
|                  | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?  Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease | 240        |     |             |
| C                | any tax-exempt bonds?   | 24c        |     |             |
| Ч                | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?   | 24d        |     |             |
|                  | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit  | 2-10       |     |             |
| Lou              | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I   | 25a        |     | x           |
| 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        |     | х           |
| 26               | Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or   |            |     |             |
|                  | former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes,"  |            |     |             |
|                  | complete Schedule L, Part II  | 26         |     | Х           |
| 27               | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial  |            |     |             |
|                  | contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member   |            |     |             |
|                  | of any of these persons? If "Yes," complete Schedule L, Part III  | 27         |     | Х           |
| 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):   |            |     |             |
| а                | A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV   | 28a        |     | Х           |
|                  | A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV  | 28b        |     | Х           |
| С                | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer,   |            |     |             |
|                  | director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV  | 28c        |     | X           |
| 29               | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M  | 29         |     | Х           |
| 30               | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation   |            |     | ,,          |
|                  | contributions? If "Yes," complete Schedule M  | 30         |     | X           |
| 31               | Did the organization liquidate, terminate, or dissolve and cease operations?  |            |     | ٦,          |
|                  | If "Yes," complete Schedule N, Part I   | 31         |     | X           |
| 32               | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete  |            |     | <b> </b> ₩  |
| 00               | Schedule N, Part II   | 32         |     | X           |
| 33               | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations  |            |     | х           |
| 24               | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I  Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and                    | 33         |     |             |
| 34               |   | 34         |     | x           |
| 252              | Part V, line 1  Did the organization have a controlled entity within the meaning of section 512(b)(13)?   | 35a        |     | X           |
|                  | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity   | 33a        |     |             |
| J                | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   | 35b        |     |             |
| 36               | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?  | 335        |     |             |
| 50               | If "Yes," complete Schedule R, Part V, line 2   | 36         |     | X           |
| 37               | Did the organization conduct more than 5% of its activities through an entity that is not a related organization  |            |     | <del></del> |
|                  | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI  | 37         |     | х           |
| 38               | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?  | Ť.         |     |             |
| -                | Note. All Form 990 filers are required to complete Schedule O   | 38         | Х   |             |
|                  |   | _          | _   | _           |

# Form 990 (2014) ON THE RISE, INC. Part V Statements Regarding Other IRS Filings and Tax Compliance

|            | Check if Schedule O contains a response or note to any line in this Part V  |          | <u></u>               |          |     |         |
|------------|---|----------|-----------------------|----------|-----|---------|
|            |   |          |                       |          | Yes | No      |
| 1a         | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable  | 1a       | 3                     |          |     |         |
| b          | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable   | 1b       | 0                     |          |     |         |
| С          | Did the organization comply with backup withholding rules for reportable payments to vendors and r  | eporta   | ble gaming            |          |     |         |
|            | (gambling) winnings to prize winners?   |          |                       | 1c       |     |         |
| 2a         | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,   |          | 4.0                   |          |     |         |
|            | filed for the calendar year ending with or within the year covered by this return   | 2a       | 19                    |          |     |         |
| b          | If at least one is reported on line 2a, did the organization file all required federal employment tax retu  |          |                       | 2b       | X   |         |
|            | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions  | s)       |                       |          |     | 77      |
|            | -   |          |                       | 3a       |     | X       |
|            | If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule  |          |                       | 3b       |     |         |
| 4a         | At any time during the calendar year, did the organization have an interest in, or a signature or other   |          | •                     |          |     | v       |
|            | financial account in a foreign country (such as a bank account, securities account, or other financial  | accou    | nt)?                  | 4a       |     | X       |
| р          | If "Yes," enter the name of the foreign country:  |          | +- (FDAD)             |          |     |         |
| <b>E</b> ~ | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial A  |          |                       | Ea       |     | Х       |
|            | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?   |          |                       | 5a<br>5b |     | X       |
|            | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a prohibited tax shelter transaction in a party to a party to a prohibited tax shelter transaction in a party to   |          |                       |          |     |         |
|            | If "Yes," to line 5a or 5b, did the organization file Form 8886-T?  Does the organization have annual gross receipts that are normally greater than \$100,000, and did the statement of the statem |          |                       | 5c       |     |         |
| ua         | any contributions that were not tax deductible as charitable contributions?   | -        |                       | 6a       |     | Х       |
| h          | If "Yes," did the organization include with every solicitation an express statement that such contributions.  |          |                       | - Ou     |     |         |
| ~          | were not tax deductible?  |          | -                     | 6b       |     |         |
| 7          | Organizations that may receive deductible contributions under section 170(c).   |          |                       |          |     |         |
| а          | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and se  | rvices p | rovided to the payor? | 7a       | Х   |         |
| b          | If "Yes," did the organization notify the donor of the value of the goods or services provided?   |          |                       | 7b       | Х   |         |
|            | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it w  |          |                       |          |     |         |
|            | to file Form 8282?  |          |                       | 7c       |     | X       |
| d          | If "Yes," indicate the number of Forms 8282 filed during the year   | 7d       |                       |          |     |         |
| е          | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit of  | contrac  | t?                    | 7e       |     | X       |
| f          | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit control  | ract?    |                       | 7f       |     | Х       |
| g          | If the organization received a contribution of qualified intellectual property, did the organization file February  | orm 88   | 399 as required?      | 7g       |     |         |
| h          | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization  |          |                       | 7h       |     |         |
| 8          | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained   |          |                       |          |     |         |
| _          | sponsoring organization have excess business holdings at any time during the year?  |          |                       | 8        |     |         |
| 9          | Sponsoring organizations maintaining donor advised funds.   |          |                       |          |     |         |
|            |   |          |                       | 9a       |     |         |
|            | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?   |          |                       | 9b       |     |         |
|            | Section 501(c)(7) organizations. Enter: Initiation fees and capital contributions included on Part VIII, line 12  | 10a      |                       |          |     |         |
|            | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities   | 10a      |                       |          |     |         |
|            | Section 501(c)(12) organizations. Enter:  |          |                       |          |     |         |
|            | Gross income from members or shareholders   | 11a      |                       |          |     |         |
|            | Gross income from other sources (Do not net amounts due or paid to other sources against  |          |                       |          |     |         |
|            | amounts due or received from them.)   | 11b      |                       |          |     |         |
| 12a        | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form  |          | ?                     | 12a      |     |         |
|            | If "Yes," enter the amount of tax-exempt interest received or accrued during the year   | 12b      |                       |          |     |         |
| 13         | Section 501(c)(29) qualified nonprofit health insurance issuers.  |          |                       |          |     |         |
| а          | Is the organization licensed to issue qualified health plans in more than one state?  |          |                       | 13a      |     |         |
|            | <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.  |          |                       |          |     |         |
| b          | Enter the amount of reserves the organization is required to maintain by the states in which the  |          | ,                     |          |     |         |
|            | organization is licensed to issue qualified health plans  | 13b      |                       |          |     |         |
|            | Enter the amount of reserves on hand  | 13c      |                       |          |     | 37      |
|            | •   |          |                       | 14a      |     | X       |
| b          | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedul  | e O      |                       | 14b      | 000 | (0011)  |
|            |   |          |                       | ⊢∩rm     | 990 | (ZU 14) |

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 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   |                        |           |        |      | X  |  |  |
|--|---|------------------------|-----------|--------|------|----|--|--|
| Sec  | tion A. Governing Body and Management   |                        |           |        |      |    |  |  |
|  |   | 1 1                    | 4.0[      |        | Yes  | No |  |  |
| 1a   | Enter the number of voting members of the governing body at the end of the tax year   | 1a                     | 13        |        |      |    |  |  |
|  | 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                     | 13        |        |      |    |  |  |
| 2  | Did any officer, director, trustee, or key employee have a family relationship or a business relationsh   | nip with any other     | - 1       |        |      |    |  |  |
|  | officer, director, trustee, or key employee?  |                        |           | 2      |      | X  |  |  |
| 3  | Did the organization delegate control over management duties customarily performed by or under the  | he direct supervisio   | n         |        |      |    |  |  |
|  | of officers, directors, or trustees, or key employees to a management company or other person? $\dots$  |                        |           | 3      |      | X  |  |  |
| 4  | Did the organization make any significant changes to its governing documents since the prior Form   | 990 was filed?         |           | 4      |      | X  |  |  |
| 5 Did the organization become aware during the year of a significant diversion of the organization's assets? |   |                        |           |        |      |    |  |  |
| 6  | Did the organization have members or stockholders?  |                        |           | 6      |      | X  |  |  |
| 7a   | Did the organization have members, stockholders, or other persons who had the power to elect or a   | appoint one or         |           |        |      |    |  |  |
|  | more members of the governing body?   |                        |           | 7a     |      | Х  |  |  |
| 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     |      | Х  |  |  |
| 8  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year   | ear by the following:  | - 1       |        |      |    |  |  |
| а  | The governing body?   |                        |           | 8a     | Х    |    |  |  |
| b  | Each committee with authority to act on behalf of the governing body?   |                        |           | 8b     | Х    |    |  |  |
| 9  | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be re  | ached at the           |           |        |      |    |  |  |
|  | organization's mailing address? If "Yes," provide the names and addresses in Schedule O   |                        |           | 9      |      | X  |  |  |
| Sec  | tion B. Policies (This Section B requests information about policies not required by the Internal F   | Revenue Code.)         |           |        |      |    |  |  |
|  |   |                        | _         |        | Yes  | No |  |  |
| 10a  | Did the organization have local chapters, branches, or affiliates?  |                        |           | 10a    |      | Х  |  |  |
| b  | If "Yes," did the organization have written policies and procedures governing the activities of such of   | 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 bo   | dy before filing the   | form?     | 11a    | Х    |    |  |  |
| b  | Describe in Schedule O the process, if any, used by the organization to review this Form 990.   |                        | - 1       |        | X    |    |  |  |
| 12a  | and a second control of the control |                        |           |        |      |    |  |  |
| b  | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give ris  | e to conflicts?        |           | 12b    | X    |    |  |  |
| С  | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "  | Yes," describe         |           |        |      |    |  |  |
|  | in Schedule O how this was done   |                        |           | 12c    | Х    |    |  |  |
| 13   | Did the organization have a written whistleblower policy?   |                        |           | 13     | X    |    |  |  |
| 14   | Did the organization have a written document retention and destruction policy?  |                        |           | 14     | X    |    |  |  |
| 15   | Did the process for determining compensation of the following persons include a review and approve  | al by independent      |           |        |      |    |  |  |
|  | persons, comparability data, and contemporaneous substantiation of the deliberation and decision  | ?                      | - 1       |        |      |    |  |  |
| а  | The organization's CEO, Executive Director, or top management official  |                        |           | 15a    | Х    |    |  |  |
| b  | Other officers or key employees of the organization   |                        |           | 15b    | Х    |    |  |  |
|  | 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 arrange  | ement with a           | - 1       |        |      |    |  |  |
|  | taxable entity during the year?   |                        | <u>[</u>  | 16a    |      | X  |  |  |
| b  | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate  | ate its participation  |           |        |      |    |  |  |
|  | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organic   | anization's            | - 1       |        |      |    |  |  |
|  | exempt status with respect to such arrangements?  |                        |           | 16b    |      |    |  |  |
| Sec  | tion C. Disclosure  |                        |           |        |      |    |  |  |
| 17   | List the states with which a copy of this Form 990 is required to be filed ►MA  |                        |           |        |      |    |  |  |
| 18   | Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-   | T (Section 501(c)(3)   | s only) a | vailab | le   |    |  |  |
|  | for public inspection. Indicate how you made these available. Check all that apply.   |                        |           |        |      |    |  |  |
|  | •   | n in Schedule O)       |           |        |      |    |  |  |
| 19   | Describe in Schedule O whether (and if so, how) the organization made its governing documents, co   | onflict of interest po | licy, and | finan  | cial |    |  |  |
|  | 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 b  |                        | <b>-</b>  |        |      |    |  |  |
|  | MARTHA SANDLER, EXECUTIVE DIRECTOR - (617) 497-790  | 68                     |           |        |      |    |  |  |
|  | 341 BROADWAY. CAMBRIDGE. MA 02139   |                        |           |        |      |    |  |  |

# Part VII 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

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

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

| (A) Name and Title                     | (B) Average hours per                                      | box              | (C) Position (do not check more than one box, unless person is both an officer and a director/trustee) |         |  |                              |   | (D)  Reportable compensation                   | (E) Reportable compensation                      | (F) Estimated amount of  |
|--|--|------------------|--|---------|--|------------------------------|---|--|--|--|
|  | week (list any hours for related organizations below line) | stee or director | Institutional trustee  | Officer |  | Highest compensated employee | Ĺ | from<br>the<br>organization<br>(W-2/1099-MISC) | from related<br>organizations<br>(W-2/1099-MISC) | other compensation from the organization and related organizations |
| (1) CAROL GOSS                         | 3.00   | .,               |  | 37      |  |                              |   | 0  | 0  | 0  |
| BOARD CHAIR                            | 2.00   | Х                |  | Х       |  |                              |   | 0.   | 0.   | 0.   |
| (2) JANNA MURGIA<br>CLERK              | 2.00   | X                |  | x       |  |                              |   | 0.   | 0.   | 0.   |
| (3) ANNE MEYER                         | 2.00   | ^                |  | ^       |  |                              |   | 0.   | 0.   | <u> </u>   |
| BOARD MEMBER                           | 2.00   | X                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (4) JOSH GERBER                        | 2.00   |                  |  |         |  |                              |   |  |  |  |
| BOARD MEMBER                           |  | x                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (5) DEBRA GAW JOSEPHSON                | 2.00   |                  |  |         |  |                              |   |  |  |  |
| BOARD MEMBER                           |  | x                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (6) BELA BASHAR                        | 1.50   |                  |  |         |  |                              |   |  |  |  |
| BOARD MEMBER                           |  | X                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (7) ANTHONY J. KOENIG, JR              | 2.00   |                  |  |         |  |                              |   |  |  |  |
| TREASURER                              |  | Х                |  | Х       |  |                              |   | 0.   | 0.   | 0.   |
| (8) SUMA NAIR                          | 0.50   |                  |  |         |  |                              |   |  |  |  |
| BOARD MEMBER                           |  | Х                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (9) JAMES CAHILL                       | 2.00   |                  |  |         |  |                              |   |  |  | _  |
| BOARD MEMBER (THRU. 3/11/14)           |  | Х                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (10) NORA MANN                         | 2.00   | ١                |  |         |  |                              |   |  | _  | •  |
| BOARD MEMBER                           | 1 2 20   | Х                |  |         |  | _                            |   | 0.   | 0.   | 0.   |
| (11) GREG MATTHEWS                     | 2.00   | ١,,              |  |         |  |                              |   |  | _  | 0  |
| BOARD MEMBER                           | 2.00   | Х                | _  |         |  | _                            |   | 0.   | 0.   | 0.   |
| (12) VIRGINIA FLEISHER<br>BOARD MEMBER | 2.00   | X                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (13) LAUREN BARNES                     | 2.00   | <u> </u>         |  |         |  |                              |   | 0.   | 0.   | <u> </u>   |
| BOARD MEMBER                           | 2.00   | X                |  |         |  |                              |   | 0.   | 0.   | 0.   |
| (14) MARTHA SANDLER                    | 30.00  | 122              |  |         |  |                              |   |  | •  |  |
| EXECUTIVE DIRECTOR/PRESIDENT           |  | 1                |  | x       |  |                              |   | 77,700.  | 0.   | 2,139.   |
|  |  |                  |  |         |  |                              |   | 77,7000  |  |  |
|  |  | <u> </u>         |  |         |  |                              |   |  |  |  |
|  |  | _                |  |         |  |                              |   |  |  |  |
|  |  |                  |  |         |  |                              |   |  |  |  |
| 420007 11 07 14                        |  |                  |  |         |  |                              |   | <u> </u>                                       |  | Form <b>990</b> (2014)   |

| Part VII | Section A. Officers, Directors, Trus  | tees, Key Em                          | ploy  | ees/                  | , and   | d Hi         | ighe                         | st C    | Compensated Employe                   | es (continued)                |                |                      |  |                |
|----------|---|---------------------------------------|---|-----------------------|---------|--------------|------------------------------|---------|---------------------------------------|-------------------------------|----------------|----------------------|--|----------------|
|          | (A)   | (B)                                   |   |                       | (0      |              |                              |         | (D)                                   | (E)                           |                |                      | (F)  |                |
|          | Name and title  | Average                               | Position (do not check more than one box, unless person is both a |                       |         |              |                              | one     | Reportable                            | Reportable                    | ÷              | Es                   | stimate                                      | <del>:</del> d |
|          |   | hours per                             | box   | , unle                | ss pe   | rson         |                              | th an   | compensation                          | compensation                  |                |                      | nount (                                      | of             |
|          |   | week<br>(list any                     | $\vdash$  | CCI ai                | 10 2 0  | 1            | 1/4/43                       | T       | from                                  | from related                  |                |                      | other  |                |
|          |   | hours for                             | Individual trustee or director                                    |                       |         |              |                              |         | the organization                      | organization<br>(W-2/1099-MIS |                | compensa<br>from the |  |                |
|          |   | related                               | e or d  | tee                   |         |              | sated                        |         | (W-2/1099-MISC)                       | (88-2/1099-1818               | 30)            |                      | anizati                                      |                |
|          |   | organizations                         | truste  | Institutional trustee |         | ee/          | mper                         |         | (11 27 1000 111100)                   |                               |                |                      | d relate                                     |                |
|          |   | below                                 | idual   | ution                 | <u></u> | key employee | est co                       | - Fe    |                                       |                               |                |                      | anizatio                                     |                |
|          |   | line)                                 | Indiv   | Instit                | Officer | Key e        | Highest compensated employee | Former  |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | L   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | 1   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | ╙   |                       |         |              | _                            |         |                                       |                               |                |                      |  |                |
|          |   |                                       | -   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | ⊢   |                       |         |              | -                            | _       |                                       |                               |                |                      |  |                |
|          |   |                                       | -   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | ⊢   |                       |         |              | $\vdash$                     | -       |                                       |                               |                |                      |  |                |
|          |   |                                       | -   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | ⊢   |                       |         |              | $\vdash$                     | -       |                                       |                               |                |                      |  |                |
|          |   |                                       | 1   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | ┢   |                       |         |              | $\vdash$                     |         |                                       |                               |                |                      |  |                |
|          |   |                                       | 1   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | $\vdash$  |                       |         |              | $\vdash$                     |         |                                       |                               |                |                      |  |                |
|          |   |                                       | 1   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       | $\vdash$  |                       |         |              | t                            |         |                                       |                               |                |                      |  |                |
|          |   |                                       | 1   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
| 1b Sub   | -total  |                                       |   |                       |         |              |                              | <b></b> | 77,700.                               |                               | 0.             |                      | 2,1  | <del>39.</del> |
|          | al from continuation sheets to Part V   |                                       |   |                       |         |              |                              |         | 0.                                    |                               | 0.             |                      |  | 0.             |
|          | al (add lines 1b and 1c)  |                                       |   |                       |         |              |                              |         | 77,700.                               |                               | 0.             |                      | 2,1  | <del>39.</del> |
|          | al number of individuals (including but r   |                                       |   |                       |         |              |                              |         | eceived more than \$100               | 0,000 of reportab             | le .           |                      |  |                |
| com      | pensation from the organization   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  | 0              |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      | Yes  | No             |
|          | the organization list any former officer,   |                                       |   |                       | •       | •            | -                            | -       | •                                     |                               |                |                      |  |                |
| line     | 1a? If "Yes," complete Schedule J for s   | such individual                       |   |                       |         |              |                              |         |                                       |                               |                | 3                    |  | X              |
|          | any individual listed on line 1a, is the su   | · · · · · · · · · · · · · · · · · · · |   | -                     |         |              |                              |         | · · · · · · · · · · · · · · · · · · · | the organization              |                |                      |  |                |
|          | related organizations greater than \$15   |                                       |   | •                     |         |              |                              |         |                                       |                               |                | 4                    |  | X              |
|          | any person listed on line 1a receive or   |                                       |   |                       |         |              |                              |         |                                       |                               | ;              |                      |  | 37             |
|          | dered to the organization? If "Yes," com  | nplete Schedul                        | e J f   | or s                  | uch     | pers         | son                          |         |                                       |                               |                | 5                    |  | X              |
| -        | B. Independent Contractors  |                                       | -1  |                       |         |              |                              | 4       | H1 5 1 41                             | \$400,000 of core             |                | - 41 4               |  |                |
|          | nplete this table for your five highest co<br>organization. Report compensation for |                                       |   |                       |         |              |                              |         |                                       |                               | npens          | ation i              | rom  |                |
|          | (A)   | trie caleridar y                      | ear   | enui                  | ng v    | VILII        | OI W                         | 1       | (B)                                   | year.                         |                | (0                   | <u>,,                                   </u> |                |
|          | Name and business   | address                               | NO  | INC                   | Ξ       |              |                              |         | Description of s                      | services                      | С              |                      | nsatio                                       | n              |
|          |   |                                       |   |                       | _       |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              | 一       |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               | l              |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               | <del>_</del> _ |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                |                      |  |                |
|          | al number of independent contractors (  |                                       | ıot lii   | mite                  | d to    |              | ^                            | stec    | d above) who received n               | nore than                     |                |                      |  |                |
| \$100    | 0,000 of compensation from the organi   | ization >                             |   |                       |         | (            | 0                            |         |                                       |                               |                |                      | 000  |                |
|          |   |                                       |   |                       |         |              |                              |         |                                       |                               |                | Form                 | <b>990</b> (2                                | 2014)          |

| Ра   | rt VII                |  |                                |   | a a in this Dart VIII |   |   |  |
|--|-----------------------|--|--------------------------------|---|-----------------------|---|---|--|
|  |                       | Check if Schedule O cont   | ains a response                | or note to any iir                          | (A) Total revenue     | (B) Related or exempt function revenue  | (C)<br>Unrelated<br>business<br>revenue | Revenue excluded from tax under sections 512 - 514 |
| Contributions, Gifts, Grants and Other Similar Amounts | b<br>c<br>d<br>e<br>f | Federated campaigns Membership dues Fundraising events Related organizations Government grants (contribut All other contributions, gifts, gran similar amounts not included abo Noncash contributions included in lines Total. Add lines 1a-1f | 1b                             | 144,811.<br>273,510.<br>583,649.<br>19,655. | 1,001,970.            |   |   |  |
| <u> </u>   |                       | Total. Add lines 1a-11   |                                | Business Code                               |                       |   |   |  |
| Program Service<br>Revenue                             | 2 a<br>b<br>c<br>d    |  |                                |   |                       |   |   |  |
| P  | f                     | All other program service reve   | enue                           |   |                       |   |   |  |
|  | g                     | Total. Add lines 2a-2f   |                                | <b>&gt;</b>                                 |                       |   |   |  |
|  | 4                     | Investment income (including other similar amounts)  | x-exempt bond p                | proceeds                                    | 4,793.                |   |   | 4,793.   |
|  | 5                     | Royalties  |                                |   |                       |   |   |  |
|  | b<br>c                | Rental income or (loss)  | (i) Real                       | (ii) Personal                               |                       |   |   |  |
|  |                       | Gross amount from sales of assets other than inventory   | (i) Securities <b>564,754.</b> | (ii) Other                                  |                       |   |   |  |
|  |                       | Less: cost or other basis<br>and sales expenses<br>Gain or (loss)  | 494,488.<br>70,266.            |   |                       |   |   |  |
|  | d                     | Net gain or (loss)   |                                | <b></b>                                     | 70,266.               |   |   | 70,266.  |
| Other Revenue  |                       | Gross income from fundraisin including \$ 144, 8 contributions reported on line Part IV, line 18   | 811 • of<br>1c). See           | 64,400.                                     |                       |   |   |  |
| Oŧ   |                       | Less: direct expenses  |                                | 47,952.                                     | 16 440                |   |   | 16 440   |
|  | 9 a                   | Net income or (loss) from fund<br>Gross income from gaming ad<br>Part IV, line 19  | ctivities. See                 | <b>&gt;</b>                                 | 16,448.               |   |   | 16,448.  |
|  |                       | Less: direct expenses  Net income or (loss) from gam   |                                |   |                       |   |   |  |
|  |                       | Gross sales of inventory, less   |                                | ···················                         |                       |   |   |  |
|  | b                     | and allowances   | a                              | <u> </u>                                    |                       |   |   |  |
|  |                       | Miscellaneous Revenu   |                                | Business Code                               |                       |   |   |  |
|  | 11 a                  |  |                                |   |                       |   |   |  |
|  | b                     |  |                                |   |                       |   |   |  |
|  | C                     |  |                                |   |                       |   |   |  |
|  | d                     | All other revenue  |                                |   |                       |   |   |  |
|  | 12                    | Total revenue. See instructions.   |                                |   | 1,093,477.            | 0.                                      | 0.                                      | 91,507.  |
| 43200<br>11-07   |                       | Table 1000 mod dodono.   |                                | ······································      | , , – . , •           | , |   | Form <b>990</b> (2014)                             |

# 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 respon  | Check if Schedule O contains a response or note to any line in this Part IX |     |     |     |  |  |  |  |  |
|  | /A\   | /D\ | (0) | (D) |  |  |  |  |  |

|    | Check if Schedule O contains a response or note to any line in this Part IX  |                       |   |   |                                       |  |  |  |  |  |
|----|--|-----------------------|---|---|---------------------------------------|--|--|--|--|--|
|    | not include amounts reported on lines 6b,<br>8b, 9b, and 10b of Part VIII.   | (A)<br>Total expenses | <b>(B)</b><br>Program service<br>expenses | ( <b>C)</b> Management and general expenses | <b>(D)</b><br>Fundraising<br>expenses |  |  |  |  |  |
| 1  | Grants and other assistance to domestic organizations  |                       |   |   |                                       |  |  |  |  |  |
|    | and domestic governments. See Part IV, line 21   |                       |   |   |                                       |  |  |  |  |  |
| 2  | Grants and other assistance to domestic  | 40 400                | 40 400                                    |   |                                       |  |  |  |  |  |
|    | individuals. See Part IV, line 22  | 48,492.               | 48,492.                                   |   |                                       |  |  |  |  |  |
| 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,   | 84,640.               | 10 027                                    | 18,621.                                     | 16 000                                |  |  |  |  |  |
| •  | trustees, and key employees  | 04,040.               | 49,937.                                   | 10,021.                                     | 16,082.                               |  |  |  |  |  |
| 6  | Compensation not included above, to disqualified   |                       |   |   |                                       |  |  |  |  |  |
|    | persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)   |                       |   |   |                                       |  |  |  |  |  |
| 7  | Other salaries and wages   | 502,392.              | 391,642.                                  | 36,279.                                     | 74,471.                               |  |  |  |  |  |
| 8  | Pension plan accruals and contributions (include   | 30273321              | 331,0121                                  | 30/2/30                                     | , _ , _ , _ •                         |  |  |  |  |  |
| 3  | section 401(k) and 403(b) employer contributions)  |                       |   |   |                                       |  |  |  |  |  |
| 9  | Other employee benefits  | 75,978.               | 69,648.                                   | 1,506.                                      | 4,824.                                |  |  |  |  |  |
| 10 | Payroll taxes  | 49,730.               | 37,635.                                   | 5,162.                                      | 6,933.                                |  |  |  |  |  |
| 11 | Fees for services (non-employees):   | -                     | -   | -   |                                       |  |  |  |  |  |
| а  | Management   |                       |   |   |                                       |  |  |  |  |  |
| b  |  |                       |   |   |                                       |  |  |  |  |  |
| С  | Accounting   | 34,501.               |   | 34,501.                                     |                                       |  |  |  |  |  |
| d  | Lobbying   |                       |   |   |                                       |  |  |  |  |  |
| е  | Professional fundraising services. See Part IV, line 17  |                       |   |   |                                       |  |  |  |  |  |
| f  | Investment management fees   |                       |   |   |                                       |  |  |  |  |  |
| g  | , ,  | 2 244                 |   | 252   | 252                                   |  |  |  |  |  |
|    | column (A) amount, list line 11g expenses on Sch 0.)   | 2,941.                | 2,235.                                    | 353.  | 353.                                  |  |  |  |  |  |
| 12 | Advertising and promotion  | 15 206                | 12 200                                    | 1 400                                       | 1 (20                                 |  |  |  |  |  |
| 13 | Office expenses  | 15,306.               | 12,280.                                   | 1,406.                                      | 1,620.                                |  |  |  |  |  |
| 14 | Information technology   | 26,196.               | 17,558.                                   | 2,748.                                      | 5,890.                                |  |  |  |  |  |
| 15 | Royalties  | 55,027.               | 47,875.                                   | 3,300.                                      | 3,852.                                |  |  |  |  |  |
| 16 | Occupancy  | 33,047.               | 47,075.                                   | 3,300.                                      | 3,032.                                |  |  |  |  |  |
| 17 | Travel   |                       |   |   |                                       |  |  |  |  |  |
| 18 | Payments of travel or entertainment expenses for any federal, state, or local public officials   |                       |   |   |                                       |  |  |  |  |  |
| 19 | Conferences, conventions, and meetings   |                       |   |   |                                       |  |  |  |  |  |
| 20 | Interest   |                       |   |   |                                       |  |  |  |  |  |
| 21 | Payments to affiliates   |                       |   |   |                                       |  |  |  |  |  |
| 22 | Depreciation, depletion, and amortization  | 33,498.               | 29,145.                                   | 2,008.                                      | 2,345.                                |  |  |  |  |  |
| 23 | Insurance  | 8,962.                | 6,370.                                    | 2,079.                                      | 513.                                  |  |  |  |  |  |
| 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 0.) |                       |   |   |                                       |  |  |  |  |  |
| а  | PROGRAM SUPPLIES   | 25,701.               | 25,701.                                   |   |                                       |  |  |  |  |  |
| b  | FUND RAISING VOLUNTEERS  | 14,849.               |   |   | 14,849.                               |  |  |  |  |  |
| С  | MISCELLANEOUS  | 8,583.                | 4,405.                                    | 1,206.                                      | 2,972.                                |  |  |  |  |  |
| d  | RECRUITMENT AND TRAININ  | 6,245.                | 4,485.                                    | 1,468.                                      | 292.                                  |  |  |  |  |  |
| e  | ·  | 002 041               | 747 400                                   | 110 (27                                     | 124 006                               |  |  |  |  |  |
| 25 | Total functional expenses. Add lines 1 through 24e   | 993,041.              | 747,408.                                  | 110,637.                                    | 134,996.                              |  |  |  |  |  |
| 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)  |                       |   |   |                                       |  |  |  |  |  |
|    | Check here if following SOP 98-2 (ASC 958-720)   |                       |   |   | Eorm <b>990</b> (2014)                |  |  |  |  |  |

# Form 990 (2014) Part X Balance Sheet

| Par           | נא  | Balance Sneet   |                   |     |             |
|---------------|-----|---|-------------------|-----|-------------|
|               |     | Check if Schedule O contains a response or note to any line in this Part X        |                   |     |             |
|               |     |   | (A)               |     | (B)         |
|               |     |   | Beginning of year |     | End of year |
|               | 1   | Cash - non-interest-bearing   | 75,951.           | 1   | 75,468.     |
|               | 2   | Savings and temporary cash investments  | 437,833.          | 2   | 534,344.    |
|               | 3   | Pledges and grants receivable, net  | 120,000.          | 3   | 90,000.     |
|               | 4   | Accounts receivable, net  |                   | 4   | 23,817      |
|               | 5   | Loans and other receivables from current and former officers, directors,          |                   |     |             |
|               |     | trustees, key employees, and highest compensated employees. Complete              |                   |     |             |
|               |     | Part II of Schedule L   |                   | 5   |             |
|               | 6   | Loans and other receivables from other disqualified persons (as defined under     |                   |     |             |
|               |     | section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing |                   |     |             |
|               |     | employers and sponsoring organizations of section 501(c)(9) voluntary             |                   |     |             |
| ţ             |     | employees' beneficiary organizations (see instr). Complete Part II of Sch L       |                   | 6   |             |
| Assets        | 7   | Notes and loans receivable, net   |                   | 7   |             |
| ₹             | 8   | Inventories for sale or use   |                   | 8   |             |
|               | 9   | Prepaid expenses and deferred charges   |                   | 9   | 13,284      |
|               | 10a | Land, buildings, and equipment: cost or other                                     |                   |     |             |
|               |     | basis. Complete Part VI of Schedule D 1,339,081                                   | •                 |     |             |
|               | b   | Less: accumulated depreciation 10b 423,862  | . 944,355.        | 10c | 915,219     |
|               | 11  | Investments - publicly traded securities  | 779,164.          | 11  | 823,838     |
|               | 12  | Investments - other securities. See Part IV, line 11                              |                   | 12  |             |
|               | 13  | Investments - program-related. See Part IV, line 11                               |                   | 13  |             |
|               | 14  | Intangible assets   |                   | 14  |             |
|               | 15  | Other assets. See Part IV, line 11  |                   | 15  |             |
|               | 16  | Total assets. Add lines 1 through 15 (must equal line 34)                         | 2,410,618.        | 16  | 2,475,970   |
|               | 17  | Accounts payable and accrued expenses   | 42,473.           | 17  | 42,777      |
|               | 18  | Grants payable  |                   | 18  |             |
|               | 19  | Deferred revenue  |                   | 19  |             |
|               | 20  | Tax-exempt bond liabilities   |                   | 20  |             |
|               | 21  | Escrow or custodial account liability. Complete Part IV of Schedule D             |                   | 21  |             |
| Se            | 22  | Loans and other payables to current and former officers, directors, trustees,     |                   |     |             |
| <u> </u>      |     | key employees, highest compensated employees, and disqualified persons.           |                   |     |             |
| Liabilities   |     | Complete Part II of Schedule L  |                   | 22  |             |
| -             | 23  | Secured mortgages and notes payable to unrelated third parties                    |                   | 23  |             |
|               | 24  | Unsecured notes and loans payable to unrelated third parties                      |                   | 24  |             |
|               | 25  | Other liabilities (including federal income tax, payables to related third        |                   |     |             |
|               |     | parties, and other liabilities not included on lines 17-24). Complete Part X of   |                   |     |             |
|               |     | Schedule D  |                   | 25  |             |
|               | 26  | Total liabilities. Add lines 17 through 25  | 42,473.           | 26  | 42,777      |
|               |     | Organizations that follow SFAS 117 (ASC 958), check here ▶ X and                  |                   |     |             |
| se            |     | complete lines 27 through 29, and lines 33 and 34.                                | 4 00:             |     | 4 004 46=   |
| auc           | 27  | Unrestricted net assets   |                   | 27  | 1,986,697   |
| Fund Balances | 28  | Temporarily restricted net assets   | 480,394.          | 28  | 446,496     |
| 힏             | 29  | Permanently restricted net assets   |                   | 29  |             |
| ᆵ             |     | Organizations that do not follow SFAS 117 (ASC 958), check here ▶ □               |                   |     |             |
| p             |     | and complete lines 30 through 34.   |                   |     |             |
| ets           | 30  | Capital stock or trust principal, or current funds                                |                   | 30  |             |
| Ass           | 31  | Paid-in or capital surplus, or land, building, or equipment fund                  |                   | 31  |             |
| Net Assets or | 32  | Retained earnings, endowment, accumulated income, or other funds                  |                   | 32  |             |
| Z             | 33  | Total net assets or fund balances   |                   | 33  | 2,433,193.  |
|               | 34  | Total liabilities and net assets/fund balances                                    | 2,410,618.        | 34  | 2,475,970.  |

| Form | 990 (2014) ON THE RISE, INC. 04-32   | 290689 | Pa  | ge <b>12</b> |
|------|--|--------|-----|--------------|
| Pa   | t XI Reconciliation of Net Assets  |        |     |              |
|      | Check 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)  | 1,093  |     |              |
| 2    | Total expenses (must equal Part IX, column (A), line 25)   | 993    | 3,0 | 41.          |
| 3    | Revenue less expenses. Subtract line 2 from line 1   | 100    | ),4 | 36.          |
| 4    | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))                                    | 2,368  |     |              |
| 5    | Net unrealized gains (losses) on investments   | -35    | 5,3 | 88.          |
| 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)   |        |     | 0.           |
| 10   | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33,                           |        |     |              |
|      | column (B)) 10   | 2,433  | 3,1 | <u>.93.</u>  |
| Pa   | t XIII Financial Statements and Reporting  |        |     |              |
|      | Check if Schedule O contains a response or note to any line in this Part XII   |        |     | Ш            |
|      |  |        | Yes | No           |
| 1    | Accounting method used to prepare the Form 990:  | _      |     |              |
|      | 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?                              | 2a     |     | X            |
|      | 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   |        |     |              |
| b    | Were the organization's financial statements audited by an independent accountant?   | 2b     | Х   |              |
|      | 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:   |        |     |              |
|      | X Separate basis Consolidated basis Both consolidated and separate basis   |        |     |              |
| С    | 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?                               | 2c     | Х   |              |
|      | If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.    |        |     |              |
| За   | 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?  | За     |     | Х            |
| 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                                     | 3b     |     |              |

#### **SCHEDULE A**

Department of the Treasury

Internal Revenue Service

(Form 990 or 990-EZ)

# **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.

► Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

ON THE RISE, INC.

Employer identification number

|          |       |                                 |                             | <u> </u>                                     |                    |                        | - I                        | 4-3290009            |
|----------|-------|---------------------------------|-----------------------------|--|--------------------|------------------------|----------------------------|----------------------|
| Pa       | rt I  | Reason for Public (             | Charity Status (            | All organizations must co                    | omplete th         | is part.) Se           | ee instructions.           |                      |
| Γhe      | organ | ization is not a private found  | ation because it is: (      | For lines 1 through 11, o                    | check only         | one box.)              |                            |                      |
| 1        |       | A church, convention of ch      | urches, or association      | on of churches describe                      | d in <b>sectio</b> | n 170(b)(1             | I)(A)(i).                  |                      |
| 2        |       | A school described in secti     | ion 170(b)(1)(A)(ii). (     | Attach Schedule E.)                          |                    |                        |                            |                      |
| 3        |       | A hospital or a cooperative     | hospital service orga       | anization described in <b>s</b> e            | ection 170         | )(b)(1)(A)(ii          | i).                        |                      |
| 4        |       | A medical research organiz      | ation operated in co        | njunction with a hospita                     | l described        | d in <b>sectio</b>     | n 170(b)(1)(A)(iii). Enter | the hospital's name, |
|          |       | city, and state:                |                             |  |                    |                        |                            | •                    |
| 5        |       | An organization operated for    | or the benefit of a co      | llege or university owne                     | d or opera         | ted by a g             | overnmental unit describ   | ped in               |
|          |       | section 170(b)(1)(A)(iv). (C    |                             | j ,  |                    | , ,                    |                            |                      |
| 6        |       | A federal, state, or local gov  |                             | nental unit described in                     | section 17         | 70(b)(1)(A)            | (v)                        |                      |
|          | X     | An organization that norma      | · ·                         |  |                    |                        | • •                        | nublic described in  |
| •        |       | section 170(b)(1)(A)(vi). (Co   | •                           | intial part of its support                   | nom a gov          | Ciriiriciitai          | dilit of from the general  | public described in  |
| 8        |       |                                 |                             | (1)(A)(vi) (Complete Per                     | + 11 \             |                        |                            |                      |
|          | H     | A community trust describe      |                             |  | -                  |                        |                            |                      |
| 9        |       | An organization that norma      | •                           | -  | -                  |                        |                            |                      |
|          |       | activities related to its exen  | -                           | •  |                    |                        |                            | -                    |
|          |       | income and unrelated busin      |                             | (less section 511 tax) fr                    | om busine          | esses acqu             | ired by the organization   | aπer June 30, 1975.  |
| 40       |       | See section 509(a)(2). (Cor     |                             |  | 0                  |                        | 201 1141                   |                      |
| 10       | H     | An organization organized a     | •                           |  | •                  |                        |                            | ,                    |
| 11       | ш     | An organization organized a     | · ·                         | · · ·  | · ·                |                        | •                          |                      |
|          |       | more publicly supported or      | -                           |  |                    |                        |                            | Check the box in     |
|          |       | lines 11a through 11d that      | • •                         |  |                    | -                      | <del>_</del>               |                      |
| а        |       |                                 | •                           | •  | •                  | -                      |                            |                      |
|          |       | the supported organization      |                             | •      | a majority         | of the dire            | ctors or trustees of the s | supporting           |
|          |       | organization. <b>You must o</b> |                             |  |                    |                        |                            |                      |
| b        |       |                                 | anization supervised        | d or controlled in connec                    | tion with it       | ts supporte            | ed organization(s), by ha  | iving                |
|          |       | control or management o         | f the supporting org        | anization vested in the s                    | ame perso          | ons that co            | ontrol or manage the sup   | ported               |
|          |       | organization(s). You mus        | t complete Part IV,         | Sections A and C.                            |                    |                        |                            |                      |
| С        |       |                                 | grated. A supporting        | g organization operated                      | in connec          | tion with, a           | and functionally integrate | ed with,             |
|          |       | its supported organization      | n(s) (see instructions      | s). You must complete                        | Part IV, Se        | ections A,             | D, and E.                  |                      |
| d        |       |                                 | <b>/ integrated.</b> A supp | orting organization oper                     | rated in co        | nnection v             | vith its supported organi  | zation(s)            |
|          |       | that is not functionally int    | egrated. The organiz        | zation generally must sa                     | tisfy a dist       | ribution re            | quirement and an attent    | iveness              |
|          |       | requirement (see instruct       | ions). <b>You must con</b>  | nplete Part IV, Section                      | s A and D,         | and Part               | V.                         |                      |
| е        |       | ☐ Check this box if the orga    | anization received a        | written determination fro                    | om the IRS         | that it is a           | Type I, Type II, Type III  |                      |
|          |       | functionally integrated, or     | Type III non-functio        | nally integrated support                     | ing organi         | zation.                |                            |                      |
| f        | Ente  | er the number of supported o    | organizations               |  |                    |                        |                            |                      |
| g        | Pro۱  | vide the following information  | about the supporte          |  |                    |                        |                            |                      |
|          | (     | i) Name of supported            | (ii) EIN                    | ` ' '' "                                     | (iv) Is the o      | rganization<br>in your | (v) Amount of monetary     | (vi) Amount of       |
|          |       | organization                    |                             | (described on lines 1-9 above or IRC section | governing          | document?              | support (see               | other support (see   |
|          |       |                                 |                             | (see instructions))                          | Yes                | No                     | Instructions)              | Instructions)        |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
|          |       |                                 |                             |  |                    |                        |                            |                      |
| <b>-</b> |       |                                 |                             |  |                    |                        |                            |                      |

LHA For Paperwork Reduction Act Notice, see the Instructions for

Form 990 or 990-EZ. 432021 09-17-14

Schedule A (Form 990 or 990-EZ) 2014

# Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Sec  | ction A. Public Support                      |                       |                       |                        |                     |                    |           |
|------|--|-----------------------|-----------------------|------------------------|---------------------|--------------------|-----------|
| Cale | ndar year (or fiscal year beginning in)      | (a) 2010              | <b>(b)</b> 2011       | (c) 2012               | (d) 2013            | (e) 2014           | (f) Total |
| 1    | Gifts, grants, contributions, and            |                       |                       |                        |                     |                    |           |
|      | membership fees received. (Do not            |                       |                       |                        |                     |                    |           |
|      | include any "unusual grants.")               | 840,268.              | 922,026.              | 1002091.               | 1063055.            | 1001970.           | 4829410.  |
| 2    | Tax revenues levied for the organ-           |                       |                       |                        |                     |                    |           |
|      | ization'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                 | 840,268.              | 922,026.              | 1002091.               | 1063055.            | 1001970.           | 4829410.  |
| 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)                                   |                       |                       |                        |                     |                    | 558,434.  |
| 6    | Public support. Subtract line 5 from line 4. |                       |                       |                        |                     |                    | 4270976.  |
| Sec  | ction B. Total Support                       |                       |                       |                        |                     |                    |           |
| Cale | ndar year (or fiscal year beginning in) 🕨    | <b>(a)</b> 2010       | <b>(b)</b> 2011       | (c) 2012               | (d) 2013            | (e) 2014           | (f) Total |
| 7    | Amounts from line 4                          | 840,268.              | 922,026.              | 1002091.               | 1063055.            | 1001970.           | 4829410.  |
| 8    | Gross income from interest,                  |                       |                       |                        |                     |                    |           |
|      | dividends, payments received on              |                       |                       |                        |                     |                    |           |
|      | securities loans, rents, royalties           |                       |                       |                        |                     |                    |           |
|      | and income from similar sources              | 7,142.                | 4,208.                | 6,053.                 | 3,958.              | 4,793.             | 26,154.   |
| 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   | <b>Total support.</b> Add lines 7 through 10 |                       |                       |                        |                     |                    | 4855564.  |
| 12   | Gross receipts from related activities,      | etc. (see instruction | ons)                  |                        |                     | 12                 | 287,800.  |
| 13   | First five years. If the Form 990 is for     | the organization's    | s first, second, thir | d, fourth, or fifth ta | ax year as a sectio | n 501(c)(3)        |           |
| _    | organization, check this box and stor        | here                  | ·····                 |                        |                     |                    | <u></u>   |
|      | ction C. Computation of Publ                 |                       |                       |                        |                     |                    | 0.5       |
| 14   | Public support percentage for 2014 (         |                       |                       |                        |                     | 14                 | 87.96 %   |
| 15   | Public support percentage from 2013          |                       |                       |                        |                     | 15                 | 86.55 %   |
| 16a  | 33 1/3% support test - 2014. If the o        |                       |                       |                        |                     |                    |           |
|      | <b>stop here.</b> The organization qualifies |                       |                       |                        |                     |                    |           |
| b    | 33 1/3% support test - 2013. If the o        |                       |                       |                        |                     |                    |           |
|      | and stop here. The organization qual         |                       |                       |                        |                     |                    |           |
| 17a  | 10% -facts-and-circumstances tes             | ū                     |                       |                        |                     |                    | •         |
|      | and if the organization meets the "fac       |                       |                       | -                      | •                   | _                  |           |
|      | meets the "facts-and-circumstances"          |                       |                       |                        |                     |                    |           |
| b    | 10% -facts-and-circumstances tes             | ū                     |                       |                        |                     | •                  |           |
|      | more, and if the organization meets the      |                       | •                     |                        | •                   |                    |           |
|      | organization meets the "facts-and-circ       |                       |                       |                        |                     |                    |           |
| 18   | Private foundation. If the organization      | n did not check a     | box on line 13, 16    | a, 16b, 17a, or 17k    | o, check this box a | nd see instruction | s ▶∟      |

Schedule A (Form 990 or 990-EZ) 2014

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

(Complete only if you checked the box on line 9 of Part I 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.)

| Sec      | ction A. Public Support   | low, please com    | piete Part II.)      |                        |                    |                      |             |
|----------|---|--------------------|----------------------|------------------------|--------------------|----------------------|-------------|
|          | ndar year (or fiscal year beginning in)   | (a) 2010           | <b>(b)</b> 2011      | (c) 2012               | (d) 2013           | (e) 2014             | (f) Total   |
|          | Gifts, grants, contributions, and   |                    | ` ,                  | <u> </u>               | , ,                | 1 ,                  | \           |
|          | membership fees received. (Do not   |                    |                      |                        |                    |                      |             |
|          | include any "unusual grants.")  |                    |                      |                        |                    |                      |             |
| 2        | Gross receipts from admissions,   |                    |                      |                        |                    |                      |             |
|          | merchandise sold or services per-   |                    |                      |                        |                    |                      |             |
|          | formed, or facilities furnished in  |                    |                      |                        |                    |                      |             |
|          | any activity that is related to the organization's tax-exempt purpose           |                    |                      |                        |                    |                      |             |
| 3        | Gross receipts from activities that   |                    |                      |                        |                    |                      |             |
| Ŭ        | are not an unrelated trade or bus-  |                    |                      |                        |                    |                      |             |
|          | iness under section 513   |                    |                      |                        |                    |                      |             |
| 4        | Tax revenues levied for the organ-  |                    |                      |                        |                    |                      |             |
| 7        | ization's benefit and either paid to  |                    |                      |                        |                    |                      |             |
|          | or expended on its behalf   |                    |                      |                        |                    |                      |             |
| _        | The value of services or facilities   |                    |                      |                        |                    |                      |             |
| 3        | furnished by a governmental unit to   |                    |                      |                        |                    |                      |             |
|          | the organization without charge   |                    |                      |                        |                    |                      |             |
|          |   |                    |                      |                        |                    |                      |             |
|          | Total. Add lines 1 through 5  |                    |                      |                        |                    |                      |             |
| 78       | Amounts included on lines 1, 2, and   |                    |                      |                        |                    |                      |             |
| <b>L</b> | 3 received from disqualified persons Amounts included on lines 2 and 3 received |                    |                      |                        |                    |                      |             |
| L        | from other than disqualified persons that                                       |                    |                      |                        |                    |                      |             |
|          | exceed the greater of \$5,000 or 1% of the                                      |                    |                      |                        |                    |                      |             |
|          | amount on line 13 for the year  |                    |                      |                        |                    |                      |             |
|          | Add lines 7a and 7b   |                    |                      |                        |                    |                      |             |
| 8        | Public support (Subtract line 7c from line 6.)                                  |                    |                      |                        |                    |                      |             |
|          | ction B. Total Support  |                    |                      |                        | 1                  | 1                    |             |
|          | ndar year (or fiscal year beginning in)   | <b>(a)</b> 2010    | <b>(b)</b> 2011      | (c) 2012               | (d) 2013           | (e) 2014             | (f) Total   |
|          | Amounts from line 6   |                    |                      |                        |                    |                      |             |
| 10a      | Gross income from interest, dividends, payments received on                     |                    |                      |                        |                    |                      |             |
|          | securities loans, rents, royalties  |                    |                      |                        |                    |                      |             |
|          | and income from similar sources   |                    |                      |                        |                    |                      |             |
| b        | Unrelated business taxable income   |                    |                      |                        |                    |                      |             |
|          | (less section 511 taxes) from businesses  |                    |                      |                        |                    |                      |             |
|          | acquired after June 30, 1975  |                    |                      |                        |                    |                      |             |
|          | Add lines 10a and 10b   |                    |                      |                        |                    |                      |             |
| 11       | Net income from unrelated business  |                    |                      |                        |                    |                      |             |
|          | activities not included in line 10b, whether or not the business is             |                    |                      |                        |                    |                      |             |
|          | regularly carried on  |                    |                      |                        |                    |                      |             |
| 12       | Other income. Do not include gain   |                    |                      |                        |                    |                      |             |
|          | or loss from the sale of capital assets (Explain in Part VI.)                   |                    |                      |                        |                    |                      |             |
| 13       | Total support. (Add lines 9, 10c, 11, and 12.)                                  |                    |                      |                        |                    |                      |             |
| 14       | First five years. If the Form 990 is for  | the organization'  | s first, second, thi | rd, fourth, or fifth t | ax year as a secti | on 501(c)(3) organi: | zation,     |
|          | check this box and stop here  |                    |                      |                        |                    |                      | <b>&gt;</b> |
| Sec      | ction C. Computation of Public  | Support Pe         | ercentage            |                        |                    |                      |             |
| 15       | Public support percentage for 2014 (lin   | ne 8, column (f) c | divided by line 13,  | column (f))            |                    | 15                   | %           |
| 16       | Public support percentage from 2013   | Schedule A, Part   | t III, line 15       |                        |                    | 16                   | %           |
| Sec      | ction D. Computation of Inves   | tment Incom        | e Percentage         |                        |                    |                      |             |
| 17       | Investment income percentage for 201  | 4 (line 10c, colu  | mn (f) divided by li | ne 13, column (f))     |                    | 17                   | %           |
| 18       | Investment income percentage from 2   | 013 Schedule A,    | Part III, line 17    |                        |                    | 18                   | %           |
|          | 33 1/3% support tests - 2014. If the o  |                    |                      |                        |                    | 33 1/3%, and line    | 17 is not   |
|          | more than 33 1/3%, check this box an  |                    |                      |                        |                    |                      |             |
| b        | 33 1/3% support tests - 2013. If the o  |                    |                      |                        |                    |                      |             |
|          | line 18 is not more than 33 1/3%, chec  | · ·                |                      |                        | •                  | •                    |             |
| 20       | Private foundation. If the organization   |                    |                      |                        |                    |                      |             |

# Part IV | Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

### Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? 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.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.
- 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)? If "Yes," describe in part yi when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2) (B) purposes? If "Yes," explain in part VI what controls the organization put in place to ensure such use.
- 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.
- b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? 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.
- 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)? 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.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) 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).
- 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?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in

#### Part VI.

- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990).
- 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))? If "Yes," provide detail in Part VI.
- b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.
- c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer (b) below.
  - b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

|     | Yes | No |
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| Pa  | rt IV   Supporting Organizations <sub>(continued)</sub>   |           |     |    |
|-----|---|-----------|-----|----|
|     |   |           | Yes | No |
| 11  | Has the organization accepted a gift or contribution from any of the following persons?   |           |     |    |
| а   | A person who directly or indirectly controls, either alone or together with persons described in (b) and (c)                      |           |     |    |
|     | below, the governing body of a supported organization?  | 11a       |     |    |
| b   | A family member of a person described in (a) above?   | 11b       |     |    |
|     | A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.             | 11c       |     |    |
|     | tion B. Type I Supporting Organizations   |           |     |    |
|     |   |           | Yes | No |
| 1   | Did the 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? If "No," describe in part y <sub>1</sub> 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.                            | 1         |     |    |
| 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? 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.  | 2         |     |    |
| Sec | tion 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)? 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).  | 1         |     |    |
| Sec | tion D. 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, (1) a written notice describing the type and amount of support provided during the prior tax             |           |     |    |
|     | year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the               |           |     |    |
|     | organization's governing documents in effect on the date of notification, to the extent not previously provided?                  | 1         |     |    |
| 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? If "No," explain in Part VI how                |           |     |    |
|     | the organization maintained a close and continuous working relationship with the supported organization(s).                       | 2         |     |    |
| 3   | By reason of the relationship described in (2), 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? If "Yes," describe in Part VI the role the organization's                      |           |     |    |
|     | supported organizations played in this regard.  | 3         |     |    |
| Sec | tion 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): | ,         |     |    |
| а   | 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.                                     |           |     |    |
| С   | The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see inst             | tructions | s). |    |
| 2   | Activities Test. Answer (a) and (b) below.  |           | Yes | No |
| а   | 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? 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.  | 2a        |     |    |
| b   | Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more               |           |     |    |
|     | of the organization's supported organization(s) would have been engaged in? 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.  | 2b        |     |    |
| 3   | Parent of Supported Organizations. <i>Answer (a) and (b) below.</i>   |           |     |    |
| а   | 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? Provide details in <i>Part VI</i> .  | 3a        |     |    |
| b   | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each               |           |     |    |
|     | of its supported organizations? If "Yes," describe in $P_{art\ VI}$ the role played by the organization in this regard.           | 3b        |     |    |

| Pa   | rt V Type III Non-Functionally Integrated 509(a)(3) Supportin                   | ıg Organ      | izations                        |                                |
|------|---|---------------|---------------------------------|--------------------------------|
| 1    | Check here if the organization satisfied the Integral Part Test as a qualifying | g trust on I  | Nov. 20, 1970. <b>See instr</b> | uctions. All                   |
|      | other Type III non-functionally integrated supporting organizations must co     | omplete Se    | ctions A through E.             |                                |
| Sect | ion A - Adjusted Net Income   |               | (A) Prior Year                  | (B) Current Year<br>(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             |                                 |                                |
| ect  | ion 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):               |               |                                 |                                |
| а    | Average monthly value of securities   | 1a            |                                 |                                |
| b    | Average monthly cash balances   | 1b            |                                 |                                |
| С    | Fair market value of other non-exempt-use assets                                | 1c            |                                 |                                |
| d    | Total (add lines 1a, 1b, and 1c)  | 1d            |                                 |                                |
| е    | Discount claimed for blockage or other  |               |                                 |                                |
|      | factors (explain in detail in Part VI):   |               |                                 |                                |
| 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 1-1/2% 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 .035   | 6             |                                 |                                |
| 7    | Recoveries of prior-year distributions  | 7             |                                 |                                |
| 8    | Minimum Asset Amount (add line 7 to line 6)                                     | 8             |                                 |                                |
| Sect | ion 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-functional  | lly-integrate | d Type III supporting ord       | ganization (see                |
|      | inetructions)   | . 0           | 3                               |                                |

Schedule A (Form 990 or 990-EZ) 2014

| Par      | LV      | Type III Non-Functionally Integrated 509                  | (a)(3) Supporting Orga        | anizations <sub>(continued)</sub> |                 |
|----------|---------|---|-------------------------------|-----------------------------------|-----------------|
| Secti    | on D -  | Distributions   |                               | ,                                 | Current Year    |
| 1        | Amou    | nts paid to supported organizations to accomplish exe     | mpt purposes                  |                                   |                 |
| 2        | Amou    | nts paid to perform activity that directly furthers exemp | t purposes of supported       |                                   |                 |
|          | organi  | zations, in excess of income from activity                |                               |                                   |                 |
| 3        | Admir   | nistrative expenses paid to accomplish exempt purpose     | es of supported organization  | IS                                |                 |
| 4        | Amou    | nts paid to acquire exempt-use assets                     |                               |                                   |                 |
| 5        | Qualif  | ied set-aside amounts (prior IRS approval required)       |                               |                                   |                 |
| 6        | Other   | distributions (describe in Part VI). See instructions.    |                               |                                   |                 |
| 7        | Total   | annual distributions. Add lines 1 through 6.              |                               |                                   |                 |
| 8        | Distrib | outions to attentive supported organizations to which the | ne organization is responsive | Э                                 |                 |
|          | (provi  | de details in <b>Part VI</b> ). See instructions.         |                               |                                   |                 |
| 9        | Distrib | outable amount for 2014 from Section C, line 6            |                               |                                   |                 |
| 10       | Line 8  | amount divided by Line 9 amount                           |                               |                                   |                 |
|          |         |   | (i)                           | (ii)                              | (iii)           |
| <b>.</b> |         | Distribution Allocations (see instance)                   | <b>Excess Distributions</b>   | Underdistributions                | Distributable   |
| Secti    | on E -  | Distribution Allocations (see instructions)               |                               | Pre-2014                          | Amount for 2014 |
| 1        | Distrib | outable amount for 2014 from Section C, line 6            |                               |                                   |                 |
| 2        | Under   | distributions, if any, for years prior to 2014            |                               |                                   |                 |
|          | (reaso  | nable cause required-see instructions)                    |                               |                                   |                 |
| 3        | Exces   | s distributions carryover, if any, to 2014:               |                               |                                   |                 |
| а        |         |   |                               |                                   |                 |
| b        |         |   |                               |                                   |                 |
| С        |         |   |                               |                                   |                 |
| d        |         |   |                               |                                   |                 |
| е        | From    | 2013  |                               |                                   |                 |
| f        | Total   | of lines 3a through e                                     |                               |                                   |                 |
| g        | Applie  | ed to underdistributions of prior years                   |                               |                                   |                 |
| h        | Applie  | ed to 2014 distributable amount                           |                               |                                   |                 |
| i        | Carry   | over from 2009 not applied (see instructions)             |                               |                                   |                 |
| j        | Rema    | inder. Subtract lines 3g, 3h, and 3i from 3f.             |                               |                                   |                 |
| 4        | Distrib | outions for 2014 from Section D,                          |                               |                                   |                 |
|          | line 7: | \$  |                               |                                   |                 |
| а        | Applie  | ed to underdistributions of prior years                   |                               |                                   |                 |
| b        | Applie  | ed to 2014 distributable amount                           |                               |                                   |                 |
| С        | Rema    | inder. Subtract lines 4a and 4b from 4.                   |                               |                                   |                 |
| 5        | Rema    | ining underdistributions for years prior to 2014, if      |                               |                                   |                 |
|          | any. S  | Subtract lines 3g and 4a from line 2 (if amount           |                               |                                   |                 |
|          | greate  | er than zero, see instructions).                          |                               |                                   |                 |
| 6        | Rema    | ining underdistributions for 2014. Subtract lines 3h      |                               |                                   |                 |
|          | and 4   | o from line 1 (if amount greater than zero, see           |                               |                                   |                 |
|          | instru  | ctions).  |                               |                                   |                 |
| 7        | Exces   | ss distributions carryover to 2015. Add lines 3j          |                               |                                   |                 |
|          | and 4   | c.  |                               |                                   |                 |
| 8        | Break   | down of line 7:   |                               |                                   |                 |
| а        |         |   |                               |                                   |                 |
| b        |         |   |                               |                                   |                 |
| С        |         |   |                               |                                   |                 |
| d        | Exces   | s from 2013   |                               |                                   |                 |
| е        | Exces   | s from 2014   |                               |                                   |                 |

Schedule A (Form 990 or 990-EZ) 2014

# **SCHEDULE D**

(Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes" to Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

► Attach to Form 990.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990

OMB No. 1545-0047 Open to Public

Inspection

Name of the organization

ON THE RISE, INC.

**Employer identification number** 04 - 3290689

| Pai | rt I Organizations Maintaining Donor Advise                        | d Funds or Other Similar Funds               | or Accounts.Complete if the                   |
|-----|--|--|---|
|     | organization answered "Yes" to Form 990, Part IV, line             | e 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 v     | writing that the assets held in donor advis  | ed funds                                      |
|     | are the organization's property, subject to the organization's     | _  |   |
| 6   | Did the organization inform all grantees, donors, and donor a      |  |   |
|     | for charitable purposes and not for the benefit of the donor o     |  |   |
|     | • •  |  |   |
| Pai |  |  |   |
| 1   | Purpose(s) of conservation easements held by the organization      |  |   |
|     | Preservation of land for public use (e.g., recreation or e         | `  | orically important land area                  |
|     | Protection of natural habitat                                      | Preservation of a certi                      |   |
|     | Preservation of open space   |  |   |
| 2   | Complete lines 2a through 2d if the organization held a qualif     | ied conservation contribution in the form    | of a conservation easement on the last        |
|     | day of the tax year.   |  |   |
|     | , ,  |  | Held at the End of the Tax Year               |
| а   | Total number of conservation easements                             |  | 2a  |
| b   |  |  |   |
| С   | Number of conservation easements on a certified historic stru      |  | ·····   |
|     | Number of conservation easements included in (c) acquired a        |  |   |
|     | listed in the National Register                                    |  |   |
| 3   | Number of conservation easements modified, transferred, rel        |  |   |
|     | year <b>&gt;</b>   |  |   |
| 4   | Number of states where property subject to conservation eas        | sement is located                            |   |
| 5   | Does the organization have a written policy regarding the per      |  |   |
|     | violations, and enforcement of the conservation easements it       |  | Yes No  |
| 6   | Staff and volunteer hours devoted to monitoring, inspecting,       |  |   |
| 7   | Amount of expenses incurred in monitoring, inspecting, and e       |  |   |
| 8   | Does each conservation easement reported on line 2(d) above        |  |   |
|     | and section 170(h)(4)(B)(ii)?                                      |  |   |
| 9   | In Part XIII, describe how the organization reports conservation   |  |   |
|     | include, if applicable, the text of the footnote to the organizat  |  |   |
|     | conservation easements.  |  | -   |
| Pai | rt III Organizations Maintaining Collections of                    | f Art, Historical Treasures, or O            | ther Similar Assets.                          |
|     | Complete if the organization answered "Yes" to Form                | 990, Part IV, line 8.                        |   |
| 1a  | If the organization elected, as permitted under SFAS 116 (AS       | C 958), not to report in its revenue staten  | nent and balance sheet works of art,          |
|     | historical treasures, or other similar assets held for public exh  | nibition, education, or research in furthera | nce of public service, provide, in Part XIII, |
|     | the text of the footnote to its financial statements that descril  | bes these items.                             |   |
| b   | If the organization elected, as permitted under SFAS 116 (AS       | C 958), to report in its revenue statement   | and balance sheet works of art, historical    |
|     | treasures, or other similar assets held for public exhibition, ec  | ducation, or research in furtherance of pul  | olic service, provide the following amounts   |
|     | relating to these items:   |  |   |
|     | (i) Revenue included in Form 990, Part VIII, line 1                |  | <b>&gt;</b> \$                                |
|     |  |  |   |
| 2   | If the organization received or held works of art, historical trea |  |   |
|     | the following amounts required to be reported under SFAS 1         | 16 (ASC 958) relating to these items:        |   |
| а   | Revenue included in Form 990, Part VIII, line 1                    |  | <b>&gt;</b> \$                                |
| b   | Assets included in Form 990, Part X                                |  | ·   |

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

Schedule D (Form 990) 2014

|       | t III   Organizations Maintaining C               | ollections of A       | rt Hiet    | orical Tr      | easures o         | r Othe     |                       |            | ts/contin  |                     | ge <b>∠</b>  |
|-------|---|-----------------------|------------|----------------|-------------------|------------|-----------------------|------------|------------|---------------------|--------------|
|       |   |                       | _          |                |                   |            |                       |            |            |                     |              |
| 3     | Using the organization's acquisition, accession   | on, and other record  | is, cneci  | k any or the   | following that    | are a siç  | gnilicant u           | ise of its | collection | items               |              |
|       | (check all that apply):                           | _                     |            |                |                   |            |                       |            |            |                     |              |
| а     | Public exhibition                                 | d                     |            |                | hange progra      | ms         |                       |            |            |                     |              |
| b     | Scholarly research                                | е                     | • [(       | Other          |                   |            |                       |            |            |                     |              |
| С     | Preservation for future generations               |                       |            |                |                   |            |                       |            |            |                     |              |
| 4     | Provide a description of the organization's co    | llections and explain | n how th   | ney further t  | he organization   | on's exen  | npt purpo             | se in Par  | t XIII.    |                     |              |
| 5     | During the year, did the organization solicit or  | r receive donations   | of art, hi | storical trea  | sures, or othe    | er similar | assets                |            | _          |                     |              |
|       | to be sold to raise funds rather than to be ma    |                       |            |                |                   |            |                       |            | Yes        |                     | No           |
| Par   | t IV Escrow and Custodial Arrang                  |                       | ete if the | organizatio    | n answered "      | Yes" to F  | orm 990,              | Part IV,   | ine 9, or  |                     |              |
|       | reported an amount on Form 990, Par               |                       |            |                |                   |            |                       |            |            |                     |              |
| 1a    | Is the organization an agent, trustee, custodi    | an or other intermed  | diary for  | contributior   | ns or other ass   | sets not i | ncluded               |            | _          |                     |              |
|       | on Form 990, Part X?                              |                       |            |                |                   |            |                       | L          | Yes        |                     | No           |
| b     | If "Yes," explain the arrangement in Part XIII    |                       |            |                |                   |            |                       |            |            |                     |              |
|       |   |                       |            |                |                   |            |                       |            | Amount     |                     |              |
| С     | Beginning balance                                 |                       |            |                |                   |            | 1c                    |            |            |                     |              |
|       | Additions during the year                         |                       |            |                |                   |            |                       |            |            |                     |              |
|       | Distributions during the year                     |                       |            |                |                   |            |                       |            |            |                     |              |
| f     | Ending balance                                    |                       |            |                |                   |            |                       |            |            |                     |              |
| 2a    | Did the organization include an amount on Fo      |                       |            |                |                   |            |                       |            | Yes        |                     | No           |
|       | If "Yes," explain the arrangement in Part XIII.   |                       |            |                |                   |            | -,                    |            |            |                     |              |
| Par   |   |                       |            |                |                   |            | ).                    |            |            |                     |              |
|       |   | (a) Current year      |            | rior year      | (c) Two years     |            | <b>d)</b> Three ye    | ears back  | (e) Four   | vears b             | ack          |
| 12    | Beginning of year balance                         |                       | (2)        | nor your       | (c) The years     | o buon     | <b>a,</b> 111100 ye   | ouro buon  | (C) i cui  | y our o b           | uon          |
|       |   |                       |            |                |                   |            |                       |            |            |                     |              |
|       | Contributions                                     |                       |            |                |                   |            |                       |            |            |                     |              |
|       | Net investment earnings, gains, and losses        |                       |            |                |                   |            |                       |            |            |                     |              |
|       | Grants or scholarships                            |                       |            |                |                   | -          |                       |            |            |                     |              |
| е     | Other expenditures for facilities                 |                       |            |                |                   |            |                       |            |            |                     |              |
|       | and programs                                      |                       |            |                | -                 |            |                       |            |            |                     |              |
| f     | Administrative expenses                           |                       |            |                |                   |            |                       |            |            |                     |              |
| g     | End of year balance                               |                       |            |                |                   |            |                       |            |            |                     |              |
| 2     | Provide the estimated percentage of the curr      | ent year end balanc   | e (line 1  | g, column (a   | a)) held as:      |            |                       |            |            |                     |              |
| а     | Board designated or quasi-endowment               |                       | _%         |                |                   |            |                       |            |            |                     |              |
| b     | Permanent endowment                               | <u></u> %             |            |                |                   |            |                       |            |            |                     |              |
| С     | Temporarily restricted endowment ▶                | %                     |            |                |                   |            |                       |            |            |                     |              |
|       | The percentages in lines 2a, 2b, and 2c should    | ld equal 100%.        |            |                |                   |            |                       |            |            |                     |              |
| За    | Are there endowment funds not in the posse        | ssion of the organiza | ation tha  | at are held a  | ınd administer    | red for th | e organiza            | ation      |            |                     |              |
|       | by:   |                       |            |                |                   |            |                       |            |            | Yes                 | No           |
|       | (i) unrelated organizations                       |                       |            |                |                   |            |                       |            | 3a(i)      |                     |              |
|       | (ii) related organizations                        |                       |            |                |                   |            |                       |            | 3a(ii)     |                     |              |
| b     | If "Yes" to 3a(ii), are the related organizations |                       |            |                |                   |            |                       |            | 3b         |                     |              |
| 4     | Describe in Part XIII the intended uses of the    |                       |            |                |                   |            |                       |            |            |                     |              |
| Par   | t VI Land, Buildings, and Equipm                  |                       |            |                |                   |            |                       |            |            |                     |              |
|       | Complete if the organization answered             |                       | , Part IV  | , line 11a. S  | See Form 990,     | Part X, li | ne 10.                |            |            |                     |              |
|       | Description of property                           | (a) Cost or o         |            |                | or other          |            | cumulate              | - L        | (d) Book   | value               |              |
|       | Decempation of property                           | basis (investr        |            |                | (other)           |            | reciation             | <b>-</b>   | (4) 2001   | valuo               |              |
| 12    | Land  | ,                     | ,          |                | 8,326.            | 2-5        |                       |            | 298        | 3,32                | 6 -          |
|       |   |                       |            |                | 6,094.            | 2          | 57,48                 | 32.        |            | 61                  |              |
|       | Buildings Leasehold improvements                  |                       |            |                | 7,306.            |            | 04,26                 |            |            | 3,04                |              |
|       |   |                       |            |                | 7,355.            |            | $\frac{62,26}{62,11}$ |            |            | $\frac{7,04}{5,23}$ |              |
|       | Equipment   |                       |            |                | , , , , , , , , , |            | V 2 , 1 1             | ·          | -          | ,, 4,               | <del>•</del> |
|       | Other   |                       | V ==1      | (D) !' :       | 10-1              |            |                       |            | 015        | ,21                 | a            |
| ιοταί | . Add lines 1a through 1e. (Column (d) must ed    | yuai FUIIII 990, Part | A, COIUN   | uu (b), IINE i | 1 UC.)            |            |                       |            | シエ、        | ,, 🗀 🎞              | · •          |

Schedule D (Form 990) 2014

| Schedule D (Form 990) 2014 ON THE RISE                               | , INC.                     | 04-3290689 <sub>Page</sub>                                |
|--|----------------------------|---|
| Part VII Investments - Other Securities.                             |                            | •   |
| Complete if the organization answered "Yes"                          | to 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)  |                            |   |
| (B)  |                            |   |
| (C)  |                            |   |
| (D)  |                            |   |
| (E)  |                            |   |
| (F)  |                            |   |
| (G)  |                            |   |
| (H)  |                            |   |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)     |                            |   |
| Part VIII Investments - Program Related.                             |                            |   |
| Complete if the organization answered "Yes"                          | to 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)  |                            |   |

### Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) Part IX Other Assets.

(5) (6) (7) (8)

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

| (a) Description   | (b) Book value |
|---|----------------|
| (1)   |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| Total (Column (b) must equal Form 900, Part Y, col. (P) line 15.) |                |

#### Other Liabilities.

Complete if the organization answered "Yes" to 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)    |   |                |
| (3)    |   |                |
| (4)    |   |                |
| (5)    |   |                |
| (6)    |   |                |
| (7)    |   |                |
| (8)    |   |                |
| (9)    |   |                |
| Total. | (Column (b) must equal Form 990, Part X, col. (B) line 25.) |                |

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 X

Schedule D (Form 990) 2014

lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

THE ORGANIZATION CURRENTLY EVALUATES ALL TAX POSITIONS, AND MAKES A DETERMINATION REGARDING THE LIKELIHOOD OF THOSE POSITIONS BEING UPHELD UNDER REVIEW. THE PRIMARY TAX POSITIONS MADE BY THE ORGANIZATION ARE THE EXISTENCE OF UNRELATED BUSINESS INCOME TAX AND THE ORGANIZATION'S STATUS AS A TAX-EXEMPT ORGANIZATION UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE. FOR THE YEARS PRESENTED, THE ORGANIZATION HAS NOT RECOGNIZED ANY TAX BENEFITS OR LOSS CONTINGENCIES FOR UNCERTAIN TAX POSITIONS BASED ON THIS EVALUATION. ALL TAX PERIODS PRIOR TO 2011 ARE NO

432054 10-01-14

LONGER SUBJECT TO EXAMINATION BY TAX AUTHORITIES.

| Schedule D (Form 990) 2014                              | ON THE RISE, INC.    | 04-3290689 Page <b>5</b> |
|---|----------------------|--------------------------|
| Schedule D (Form 990) 2014  Part XIII Supplemental Info | ormation (continued) |                          |
|   |                      |                          |
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#### **SCHEDULE G**

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

# **Supplemental Information Regarding Fundraising or Gaming Activities**

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

► Attach to Form 990 or Form 990-EZ.

Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form 990.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

ON THE BISE INC

Employer identification number 04-3290689

| ON THE   | KIDE, INC.                                |                                    |                    |                        | 04-3290                                 | 009                 |  |  |
|--|---|------------------------------------|--------------------|------------------------|---|---------------------|--|--|
| Part I Fundraising Activities required to complete this par            | • Complete if the organization answet.    | ered "Y                            | es" to             | Form 990, Part IV, li  | ine 17. Form 990-EZ                     | filers are not      |  |  |
| 1 Indicate whether the organization rais                               |   | na acti                            | vities             | Check all that apply   |   |                     |  |  |
|  |   |                                    |                    |                        | •                                       |                     |  |  |
| a Mail solicitations   |   |                                    |                    | overnment grants       |   |                     |  |  |
| b Internet and email solicitations f Solicitation of government grants |   |                                    |                    |                        |   |                     |  |  |
| c Phone solicitations g Special fundraising events                     |   |                                    |                    |                        |   |                     |  |  |
| d In-person solicitations  |   |                                    |                    |                        |   |                     |  |  |
| 2 a Did the organization have a written of                             | or oral agreement with any individual     | (includ                            | dina o             | fficare directore true | etage or                                |                     |  |  |
|  |   |                                    |                    |                        |   |                     |  |  |
| key employees listed in Form 990, F                                    | •   |                                    |                    | -                      |   |                     |  |  |
| <b>b</b> If "Yes," list the ten highest paid ind                       |   | uant to                            | agre               | ements under which     | the fundraiser is to                    | be                  |  |  |
| compensated at least \$5,000 by the                                    | e organization.                           |                                    |                    |                        |   |                     |  |  |
|  | İ   |                                    |                    |                        |   |                     |  |  |
| (i) Name and address of individual                                     |   | (iii)<br>fundr<br>have c<br>or con | Did                | (iv) Gross receipts    | (v) Amount paid                         | (vi) Amount paid    |  |  |
| or entity (fundraiser)   | (ii) Activity                             | have c                             | ustody             | from activity          | to (or retained by) fundraiser          | to (or retained by) |  |  |
| or entity (fundraiser)   |   | contrib                            | troi of<br>utions? | I HOITI activity       | listed in col. (i)                      | organization        |  |  |
|  |   | <del>  </del>                      |                    |                        | • |                     |  |  |
|  |   | Yes                                | No                 |                        |   |                     |  |  |
|  |   |                                    |                    |                        |   |                     |  |  |
|  |   |                                    |                    |                        |   |                     |  |  |
|  |   |                                    |                    |                        |   |                     |  |  |
|  |   |                                    |                    |                        |   |                     |  |  |
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| 「otal  |   |                                    |                    |                        |   |                     |  |  |
| 3 List all states in which the organization                            | on is registered or licensed to solicit   | contrib                            | utions             | s or has been notified | d it is exempt from re                  | egistration         |  |  |
| or licensing.  | or is registered of illecrised to solicit | COLLLING                           | ationic            | or rias been notified  | a it is exempt from it                  | Sgistration         |  |  |
| or neoricing.  |   |                                    |                    |                        |   |                     |  |  |
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LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule G (Form 990 or 990-EZ) 2014

Schedule G (Form 990 or 990-EZ) 2014 ON THE RISE, INC. 04-3290689 Page 2 Fundraising Events. Complete if the organization answered "Yes" to 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 **(b)** Event #2 (c) Other events (d) Total events NONE (add col. (a) through DINNER/GALA col. (c)) (event type) (total number) (event type) Revenue 1 Gross receipts 209,211 209,211. 144,811. 144,811. 2 Less: Contributions 64,400 64,400. Gross income (line 1 minus line 2) 4 Cash prizes 5 Noncash prizes ..... Direct Expenses 43,072. 43,072. 6 Rent/facility costs 7 Food and beverages 8 Entertainment 9 Other direct expenses 4,880. 4,880. 47,952 **10** Direct expense summary. Add lines 4 through 9 in column (d) 16,448 11 Net income summary. Subtract line 10 from line 3, column (d) Part III Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a. (b) Pull tabs/instant (d) Total gaming (add (a) Bingo (c) Other gaming Revenue bingo/progressive bingo col. (a) through col. (c)) Gross revenue ..... 2 Cash prizes Direct Expenses 3 Noncash prizes 4 Rent/facility costs 5 Other direct expenses Yes Yes % Yes 6 Volunteer labor 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? **b** If "No," explain:

Schedule G (Form 990 or 990-EZ) 2014

**b** If "Yes," explain:

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?

| Sch | edule G (Form 990 or 990-EZ) 2014 ON THE RISE, INC.  | 32906      | 689    | Page 3   |
|-----|--|------------|--------|----------|
|     | Does the organization conduct gaming activities with nonmembers?   |            | es/    | □ No     |
|     | Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed         |            | ⁄es    | □ No     |
| 40  | to administer charitable gaming?   | I          | res    | NО       |
|     | Indicate the percentage of gaming activity conducted in:   | اءما       |        | 07       |
|     | The organization's facility  |            |        | <u>%</u> |
|     | 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?                 | 🔲 <b>Y</b> | /es    | ☐ No     |
| ŀ   | o If "Yes," enter the amount of gaming revenue received by the organization > \$ and the amount                              |            |        |          |
|     | of gaming revenue retained by the third party $\blacktriangleright$ \$   |            |        |          |
| ,   | If "Yes," enter name and address of the third party:   |            |        |          |
|     | The foot, often name and address of the time party.  |            |        |          |
|     | Name   |            |        |          |
|     | Address  |            |        |          |
| 16  | Gaming manager information:  |            |        |          |
|     | Name   |            |        |          |
|     | Gaming manager compensation ▶ \$   |            |        |          |
|     | Description of convices provided   |            |        |          |
|     | Description of services provided   |            |        |          |
|     |  |            |        |          |
|     |  |            |        |          |
|     | ☐ Director/officer ☐ Employee ☐ Independent contractor   |            |        |          |
| 17  | Mandatory distributions:   |            |        |          |
|     | Is the organization required under state law to make charitable distributions from the gaming proceeds to                    |            |        |          |
| •   | retain the state gaming license?   |            | /es    | ☐ No     |
| ŀ   | • Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the | — •        |        |          |
| •   | organization's own exempt activities during the tax year > \$  |            |        |          |
| Pa  | ITT IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III,  | lines 9 9  | h 10   | h 15h    |
|     | 15c, 16, and 17b, as applicable. Also provide any additional information (see instructions).                                 |            | 55, 10 | ο, του,  |
|     | ····, ···, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ····, ···               |            |        |          |
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| Schedule 6 | G (Form 990 or 990-EZ)                    | ON THE RISE, INC    | • | 04-3290689 <sub>Page 4</sub> |
|------------|---|---------------------|---|------------------------------|
| Part IV    | G (Form 990 or 990-EZ)  Supplemental Info | rmation (continued) |   |                              |
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#### SCHEDULE I (Form 990)

Department of the Treasury Internal Revenue Service

Name of the organization

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

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

➤ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

| Does the organization maintain records to substantials the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection orderia used to award the grants or assistance?   No separate the organization and powers the organization and     | ON THE RI                                  | SE, INC.               |                                |                      |                        |                                     |                           | 04-3290689          |
|---|--|------------------------|--------------------------------|----------------------|------------------------|-------------------------------------|---------------------------|---------------------|
| oriteria used to award the grants or assistance? 2 Describe in Part IV the organizations procedures for monitoring the use of grant funds in the United States.  Part III Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" to 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.  1 (a) Name and address of organization or government  (b) EIN (c) IRC section (d) Amount of non-cash assistance or government or ganization or government or ganization (assistance)  (b) EIN (c) IRC section (d) Amount of non-cash assistance or government or ganization or government or ganization assistance or government or ganization or government or ganizations listed in the line 1 table  2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table   | Part I General Information on Grants       | and Assistance         |                                |                      |                        |                                     |                           |                     |
| 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 Covernments. Complete if the organization answered "Yes" to 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.  1 (a) Name and address of organization or government  (b) EIN (c) IRC section if applicable as a signature of the cash grant in the United States.  (c) IRC section if applicable as a signature of the cash grant in the United States.  (d) Amount of coach grant on on-cash assistance in on-cash assistance of the United States.  (h) Purpose of grant on-cash assistance of the United States of the United States.  (a) Amount of coach grant on-cash assistance in the United States.  (b) EIN (c) IRC section if applicable as a signature of the United States.  (c) IRC section if (a) Amount of coach grant on-cash assistance of the United States.  (c) IRC section if additional space is needed.  (d) Amount of coach grant on-cash assistance of the United States of the United States.  (d) Amount of coach grant on-cash assistance of the United States.  (p) Description of valuation (book, PkW, Opensia).  (p) Description of valuation (book, | 1 Does the organization maintain records   | to substantiate the    | e amount of the grant          | s or assistance, the | e grantees' eligibilit | ty for the grants or ass            | sistance, and the selecti |                     |
| Compared to the Passistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" to 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.    1 (a) Name and address of organization or government   (b) EIN   (c) IRC section (d) Amount of applicable   (e) Amount of cash grant   (e) Amount of non-cash assistance   (f) Method of Yell, vision (pox, FMV, appraisal, other)   (f) Description of non-cash assistance   (f) Description of non-cash assistance   (f) Description of non-cash assistance   (f) Description of on-cash assistance   (f) Description of non-cash assist   | criteria used to award the grants or ass   | istance?               |                                |                      |                        |                                     |                           | N                   |
| recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.  1 (a) Name and address of organization or government  (b) EIN (c) IRC section (assh grant)  (c) IRC section (cash grant)  (d) Amount of cash grant (and properties)  (e) Amount of cash grant (and properties)  (f) Method of valuation (book, FMV, appraisal, other)  (g) Description of oncash assistance (h) Purpose of grant or assistance ( |  |                        |                                |                      |                        |                                     |                           |                     |
| 1 (a) Name and address of organization or government  (b) EIN  (c) IRC section (d) Amount of cash grant  (d) Amount of cash grant  (e) Amount of valuation (book, FMV, appraisal, other)  (g) Description of non-cash assistance  (g) Description of on-cash assistance  (h) Purpose of grant or assistance  (h) Purpose of grant or assistance  (h) Purpose of grant or assistance  (g) Description of on-cash assistance  (g) Description of on-cash assistance  (h) Purpose of grant or assistance  (h) Purpose of grant or assistance  (g) Description of on-cash assistance  (g  | Granto ana Other Addictance to             |                        |                                |                      |                        | anization answered "\               | Yes" to Form 990, Part I  | V, line 21, for any |
| To government (i) EIN (ii) Fix Section or government (iii) EIN (iii) Fix Section (ii  |  | <del> </del>           | · ·                            | · ·                  | 1                      | (s) Mathad of                       |                           |                     |
|   |  | (b) EIN                |                                |                      | non-cash               | valuation (book,<br>FMV, appraisal, |                           |                     |
|   |  |                        |                                |                      |                        |                                     |                           |                     |
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|   |  |                        |                                |                      |                        |                                     |                           |                     |
|   | 2 Enter total number of section 501(c)(3): | I<br>and government or | L<br>ganizations listed in the | ne line 1 table      | 1                      | I                                   |                           | •                   |
|   |  |                        |                                |                      |                        |                                     |                           |                     |

Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III 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 non-<br>cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of non-cash assistance |
|---------------------------------|--------------------------|--------------------------|---------------------------------------|---|--|
|                                 |                          |                          |                                       |   |  |
|                                 |                          |                          |                                       | COST AND FAIR VALUE OF                                |  |
| MEALS                           | 352                      | 0.                       | 24,717.                               | DONATED GOODS   | VALUE OF MEALS SERVED                  |
|                                 |                          |                          |                                       |   |  |
|                                 |                          |                          |                                       | COST AND FAIR VALUE OF                                | TRAVEL, CLIENT SERVICES,               |
| DIRECT CLIENT ASSISTANCE        | 396                      | 0.                       | 14,337.                               | DONATED GOODS   | PERSONAL ITEMS, FURNISHINGS            |
|                                 |                          |                          |                                       |   |  |
| HOUSING STABILIZATION FUNDS     | 34                       | 9,438.                   | 0.                                    | COST  | N/A                                    |
|                                 |                          |                          |                                       |   |  |
|                                 |                          |                          |                                       |   |  |
|                                 |                          |                          |                                       |   |  |
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Part IV | Supplemental Information. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

PART I, LINE 2:

MEALS AND DIRECT CLIENT ASSISTANCE -

ON THE RISE CONDUCTS A BRIEF INTERVIEW WITH EVERY PROGRAM CANDIDATE TO DETERMINE WHETHER SHE IS ELIGIBLE FOR ACCESS TO THE SAFE HAVEN PROGRAM AND THE TANGIBLE DIRECT ASSISTANCE THAT IS INTEGRAL TO THE PROGRAM, SUCH AS MEALS AND PERSONAL ITEMS. THE INTERVIEW AND ACCEPTANCE TO THE SAFE HAVEN PROGRAM ESTABLISH PARTICIPANTS' ACCESS TO THE 2 MEALS PER DAY PROVIDED ON-SITE AT 341 BROADWAY. VARIOUS TYPES OF PERSONAL ASSISTANCE ARE ALSO 35

| Part IV Supplemental Information   |
|--|
| AVAILABLE AD HOC, SUBJECT TO PROGRAM PARTICIPANT'S PARTICULAR              |
| CIRCUMSTANCES, INCLUDING SUCH MATTERS AS INCOME AND HOUSING STATUS, AS     |
| REVIEWED AND APPROVED BY ON THE RISE'S TEAM OF SIX COMMUNITY ADVOCATES.    |
|  |
| HOUSING STABILIZATION FUNDS -  |
|  |
| OTR PROVIDES UP TO \$1,000 PER PARTICIPANT FOR COSTS ASSOCIATED WITH       |
| RETAINING OR ATTAINING STABLE HOUSING INCLUDING FIRST MONTH, LAST MONTH OR |
| SECURITY DEPOSIT AND UTILITY ARREARAGE. REQUESTS FOR ASSISTANCE ARE MADE   |
| THROUGH A PROCESS WITH AN ADVOCATE, REVIEWED AND APPROVED BY THE EXECUTIVE |
| DIRECTOR. PAYMENTS ARE MADE DIRECTLY TO THE LANDLORD OR VENDOR ON BEHALF   |
| OF THE PARTICIPANT.  |
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### SCHEDULE O

Internal Revenue Service

(Form 990 or 990-EZ) Department of the Treasury

# 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.

Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990

► Attach to Form 990 or 990-EZ.

Open to Public

OMB No. 1545-0047

Inspection

Name of the organization

**Employer identification number** 04-3290689

ON THE RISE, INC. FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: TO MOVE OUT OF HOMELESSNESS. WE ENGAGE WITH THOSE MOST IN NEED AND SUPPORT THEIR INITIATIVE AND STRENGTH AS THEY MOVE BEYOND CRISIS AND DISCOVER NEW POSSIBILITIES. FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: POSSIBILITIES. FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: ARE TO: PROVIDE A SAFE SPACE SIX DAYS A WEEK WHERE WOMEN CAN FIND GOAL 1:

PRACTICAL NECESSITIES AND A SUPPORTIVE COMMUNITY TO BEGIN TO EXPLORE THE STEPS THEY NEED TO TAKE TO MOVE OUT OF HOMELESSNESS AND INCREASE THEIR QUALITY OF LIFE.

GOAL 2: PROVIDE ADVICE, ASSISTANCE, ACCOMPANIMENT AND ADVOCACY FOR WOMEN ADDRESSING HOUSING, ABUSE, TRAUMA, PHYSICAL/MENTAL HEALTH, LEGAL, AND OTHER URGENT NEEDS AND ISSUES.

EASE WOMEN'S ACCESS TO AND TRANSITION INTO SPECIALIZED AND SINGLE-ISSUE PROGRAMS AND EVENTUALLY OUT OF HOMELESSNESS.

OTR RELIES ON A COLLABORATIVE NETWORK WITH APPROXIMATELY FIFTY OTHER HUMAN SERVICE PROVIDERS. THIS NETWORK HELPS THE PROGRAM FACILITATE A

WOMAN'S ACCESS AND SUCCESS IN PROGRAMS SUCH AS BATTERED WOMEN'S

Schedule O (Form 990 or 990-EZ) (2014)

432211 08-27-14

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Name of the organization ON THE RISE, INC.

Employer identification number 04-3290689

SERVICES, DETOXIFICATION PROGRAMS, EMERGENCY AND TRANSITIONAL SHELTERS

AND HOUSING, LEGAL AND HEALTHCARE SERVICES, AND MORE. OTR DOES NOT

DUPLICATE OTHER SERVICES, BUT FILLS IN THE CRACKS TO MAKE THE WHOLE

SYSTEM WORK BETTER FOR WOMEN WHO NEED IT THE MOST.

MANY WOMEN AT OTR MUST COPE WITH COMPLEX PHYSICAL AND MENTAL HEALTH

CONDITIONS. A PROGRAM PARTICIPANT'S STRUGGLE OFTEN IS COMPLICATED BY

THE FACT THAT SHE CANNOT SET A DAILY ROUTINE, SHE HAS NO SENSE OF PLACE

IN A FAMILY OR IN A COMMUNITY, AND SHE HAS LITTLE CONTROL OVER WHEN AND

WHAT SHE EATS, WHERE SHE CAN SLEEP, AND OTHER BASIC SURVIVAL NEEDS.

HEALTH ACCESS AND WELLNESS ACTIVITIES IN THE SAFE HAVEN BREAK DOWN

BARRIERS TO HEALTHCARE BY FACILITATING ACCESS TO EMERGENCY, PRIMARY AND

PREVENTATIVE HEALTHCARE THROUGH REFERRALS, SUPPORT, ACCOMPANIMENT AND

ADVOCACY WITH WOMEN AT COMMUNITY HEALTH CENTERS, HOSPITALS AND OTHER

SERVICES. THESE AND OTHER STRENGTHS-BASED GROUP AND INDIVIDUAL

ACTIVITIES ARE CRITICAL COMPONENTS OF OTR'S SUCCESS.

#### KEEP THE KEYS:

OTR HAS HELPED MANY HOMELESS WOMEN MOVE INTO HOUSING OF THEIR OWN;

HOWEVER, WOMEN CONTINUE TO STRUGGLE WITH ADDICTION, MENTAL HEALTH,

PARENTING, FINANCIAL, EMPLOYMENT, LEGAL, AND OTHER CHALLENGES AFTER

THEY HAVE MOVED INTO HOUSING, AND THEY FACE THE NEW RESPONSIBILITIES OF

INDEPENDENT LIVING.

PARTICIPANTS IN THE KEEP THE KEYS PROGRAM MAINTAIN THEIR CONNECTIONS

WITH OTR STAFF AND RECEIVE A RANGE OF SERVICES DESIGNED TO SUPPORT

HOUSING RETENTION AND TO HELP WOMEN BUILD THE NEIGHBORHOOD CONNECTIONS

Schedule O (Form 990 or 990-EZ) (2014)

Name of the organization ON THE RISE, INC.

Employer identification number 04-3290689

AND INDEPENDENT LIVING SKILLS THEY NEED TO SUSTAIN THEIR QUALITY OF

LIFE. SERVICES INCLUDE HOME VISITS, GOAL-SETTING, TRAINING IN LIFE

SKILLS, WEEKLY MEETINGS AND GATHERINGS AT OTR AND LIMITED ACCESS TO THE

SAFE HAVEN.

FORM 990, PART VI, SECTION B, LINE 11:

THE MEMBERS OF THE BOARD OF DIRECTORS RECEIVED A COPY OF THE FORM 990,

EXCEPT FOR CONFIDENTIAL DONOR INFORMATION, PRIOR TO ITS FILING. THE BOARD

OF DIRECTORS AUTHORIZED THE AUDIT/FINANCE COMMITTEE TO REVIEW AND APPROVE

THE FORM 990 PRIOR TO ITS FILING. THE FORM 990 WAS THEN AUTHORIZED AND

SIGNED BY THE ORGANIZATION'S EXECUTIVE DIRECTOR.

FORM 990, PART VI, SECTION B, LINE 12C:

AN INDEPENDENT COMPLIANCE OFFICER SHALL BE ELECTED BY THE BOARD. IN THE

ABSENCE OF A SPECIFICALLY IDENTIFIED COMPLIANCE OFFICER, THE TREASURER

SHALL SERVE AS THE COMPLIANCE OFFICER.

THE EXECUTIVE DIRECTOR AND COMPLIANCE OFFICE SHALL REVIEW ALL CONFLICT OF

INTEREST DISCLOSURES ANNUALLY AND REFER CONFLICTS TO A COMMITTEE OF THE

BOARD FOR REVIEW AND DISPOSITION. THE REVIEWING COMMITTEE SHALL EVALUATE

AND MAKE A WRITTEN RECOMMENDATION TO THE BOARD THAT ADDRESSES THE RISK TO

ON THE RISE OF THE CONFLICT AND HOW THE RISK WILL BE MITIGATED.

THE REVIEWING COMMITTEE SHALL BE THE EXECUTIVE COMMITTEE, UNLESS AN

INDIVIDUAL WITH A CONFLICT IS ALSO AN EXECUTIVE COMMITTEE MEMBER. IN THAT

CASE, THE INDIVIDUAL WITH A CONFLICT SHALL EXCUSE HIM OR HERSELF AND THE

REMAINING COMMITTEE MEMBERS WILL SELECT A REPLACEMENT.

Name of the organization ON THE RISE, INC.

Employer identification number 04-3290689

THE RECOMENDATION AND DISPOSITION BY THE BOARD SHALL BE INCORPORATED INTO THE OFFICIAL MINUTES.

FORM 990, PART VI, SECTION B, LINE 15:

THE BOARD OF DIRECTORS DETERMINES THE EXECUTIVE DIRECTOR'S COMPENSATION AND BENEFITS. THIS MAY HAPPEN IN CONNECTION WITH AN ANNUAL PERFORMANCE REVIEW IN WRITING AS OUTLINED IN THE GOVERNANCE POLICIES. IN DETERMINING COMPENSATION, THE BOARD TAKES INTO ACCOUNT FACTORS INCLUDING EXECUTIVE COMPENSATION OF COMPARABLE ORGANIZATIONS (SIZE, LOCATION, CLIENT POPULATION, SERVICE MODEL), QUALITY OF PERFORMANCE, LENGTH OF SERVICE, COST TO REPLACE AND FINANCIAL RESOURCES/LIMITATIONS OF THE ORGANIZATION.

THE EXECUTIVE DIRECTOR IS RESPONSIBLE FOR DETERMINING COMPENSATION AND

BENEFITS OF ALL OTHER STAFF MEMBERS. COMPENSATION LEVELS SHALL TAKE INTO

ACCOUNT FACTORS INCLUDING COMPENSATION FOR COMPARABLE

POSITIONS/ORGANIZATIONS (SIZE, LOCATION, CLIENT POPULATION, SERVICE MODEL),

QUALITY OF PERFORMANCE, LENGTH OF SERVICE, COST TO REPLACE AND FINANCIAL

RESOURCES/LIMITATIONS OF THE ORGANIZATION.

THE EXECUTIVE COMMITTEE SHALL REVIEW THE EXECUTIVE DIRECTOR'S

RECOMMENDATIONS FOR COMPENSATION OF KEY EMPLOYEES IN ADVANCE OF ANY

CHANGES, AND MAY VETO THE EXECUTIVE DIRECTOR'S RECOMMENDATION IF IT IS

DEEMED INCONSISTENT WITH THE FACTORS NOTED ABOVE.

BONUS COMPENSATION FOR ANY STAFF IN EXCESS OF 1% OF THE INDIVIDUAL'S ANNUAL WAGES OR SALARY MUST BE EXPLICITLY APPROVED BY THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION C, LINE 19:

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|         | e O (Form 990 or | 990-EZ | ) (2014) |       |      | Page 2                                    |
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