## **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

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Department of the Treasury Internal Revenue Service

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

20 For the 2021 calendar year, or tax year beginning 2021, and ending D Employer identification number C Name of organization Insight Center for Community Economic Development Check if applicable: B 94-2410277 Address change Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite E Telephone number Name change 510-466-1692 500A Initial return City or town, state or province, country, and ZIP or foreign postal code Final return/terminated G Gross receipts \$ 1,697,291 Oakland, CA 94612-3200 Amended return H(a) Is this a group return for subordinates? Yes Vo F Name and address of principal officer: Anne E. Price Application pending H(b) Are all subordinates included? Yes No 360 14th Street, Suite 500A, Oakland, CA 94612-3200 If "No," attach a list. See instructions. 4947(a)(1) or Tax-exempt status: √ 501(c)(3) 501(c) ( ) < (insert no.) H(c) Group exemption number ▶ Website: ► www.insightcced.org L Year of formation: M State of legal domicile: CA 1977 Part I Briefly describe the organization's mission or most significant activities: A national economic justice organization, the Insight Center works to build inclusion and equity for people of color, women, immigrants, and low-income families. Through research, Activities & Governance advocacy, narrative change, and thought leadership, we aim to ensure that all people become and remain economically secure. Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets. Number of voting members of the governing body (Part VI, line 1a) . . . . . 6 Number of independent voting members of the governing body (Part VI, line 1b) 4 6 Total number of individuals employed in calendar year 2021 (Part V, line 2a) 5 5 7 6 Total number of volunteers (estimate if necessary) . . . . . . 6 0 Total unrelated business revenue from Part VIII, column (C), line 12 7a 0 Net unrelated business taxable income from Form 990-T, Part I, line 11 7b 0 **Prior Year Current Year** 8 Contributions and grants (Part VIII, line 1h) . . . . 1,043,129 1,159,393 Revenue Program service revenue (Part VIII, line 2g) 105,770 277,515 Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . 18 285 10 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . 0 11 47,870 1,485,063 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) 1,148,917 12 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) . . . . . 0 14 Benefits paid to or for members (Part IX, column (A), line 4) . . . . . . 0 0 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 15 703,440 787,182 Professional fundraising fees (Part IX, column (A), line 11e) . . . . . . 16a Total fundraising expenses (Part IX, column (D), line 25) ► 52,162 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) . . . . . 433,782 488,961 18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) 1,137,222 1,276,143 Revenue less expenses. Subtract line 18 from line 12 19 11,695 208,920 **Beginning of Current Year End of Year** 6 Assets 20 Total assets (Part X, line 16) 929,257 1,680,271 21 Total liabilities (Part X, line 26) . . . 63,162 605,256 22 Net assets or fund balances. Subtract line 21 from line 20 866,095 1,075,015 Part II Signature Block Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge. Sign 2022 Here Type or print name and title Print/Type preparer's name Preparer's signature Date Check \_\_\_ if Paid

May the IRS discuss this return with the preparer shown above? See instructions

Preparer

Use Only

Firm's name

Firm's address

self-employed

Firm's EIN ▶

| II Pair | Statement of Program Service Accomplishments   |
|---------|--|
| 10 000  | - Control of the cont |
| 1       | Check if Schedule O contains a response or note to any line in this Part III   |
|         |  |
|         | A national economic justice organization, Insight helps people and communities become and remain economically secure. With a   |
|         | particular focus on race, gender, and place in the pursuit of impactful economic change, we work to build inclusion and equity for   |
|         | people of color, women, immigrants and low-income families. Through research, advocacy, narrative change, and thought leadership   |
| 2       | we promote informed and inclusive decision-making for effective policy and practice, resulting in improved economic outcomes.  Did the organization undertake any significant program services during the year which were not listed on the  |
|         | DHOI FORM 990 OF 990-E77   |
|         | If "Yes," describe these new services on Schedule O.   |
| 3       | Did the organization cease conducting, or make significant changes in how it conducts, any program   |
|         | Services r   |
|         | If "Yes," describe these changes on Schedule O.  ☐ Yes ✓ No  |
| 4       | Describe the organization's program service accomplishments for each of its the  |
|         | Describe the organization's program service accomplishments for each of its three largest program services, as measured be 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 \$ 387.491 including grapts of \$ ) (Pourse \$  |
|         | 16 776   |
|         | Workforce Development - Insight focuses on activities that help low-income people access jobs that pay well, have career ladders,  |
|         | and are high quality with benefits and opportunities. Insight conducts research and outlines solutions that ensure working people as   |
|         | thive. In 2021, insignt continued our efforts to advance the well-being of Mississippians disconnected from employment and   |
|         | education, locusing on Black and low-income persons in certain counties. Following our examination of regional labor markets, the  |
|         | workforce system, partiers to work, and structural factors such as occupational crowding, we outlined approaches to address the  |
|         | two-tiered labor market in Mississippi, with implications for other states. We continued our efforts in the San Francisco Pou Area to  |
|         | riightight the ways in which workforce institutions may be perpetuating racial and gender hias and inequities, and continued our   |
|         | enous to address employment equity for formerly incarcerated persons. Finally, we connected these efforts with our larger educations.  |
|         | to eliminate harmful court fines and fees, and other policies and practices that perpetuate racial and gender inequities in the  |
|         | workforce development system.  |
|         |  |
|         |  |
| 4b      | (Code:) (Expenses \$ 343,017 including grants of \$) (Revenue \$ 95,500)   |
|         | Economic Security - Insight is a national leader in advancing ideas and solutions that address the root causes of connection and insight is a national leader in advancing ideas and solutions that address the root causes of connection and insight in the cause of connection and cause of connection and insight in the cause of connection and cause of connection and cause of connection and cause of connection and cause of cause of connection and cause of cause o |
|         | In 2021, Insight staff co-authored an article in TIME magazine about the need to enact real structural solutions to account for racism   |
|         | within our economy and democracy one year from the George Floyd protests. Insight released a new paper in partnership with the   |
|         | Samuel DuBois Cook Center on Social Equity at Duke University called Running Up the Down Escalator: How Narratives Shape Our   |
|         | Understanding of Racial Wealth Inequality. Insight published an op-ed on the gendered narratives driving the media and politicians'  |
|         | framing of the different infrastructure bills in Congress. Staff were featured as economic experts on news segments discussing the   |
|         | importance of human infrastructure spending such as the expanded Child Tax Credit. Staff presented at a Federal Reserve Board  |
|         | event on Racism and the Economy: Focus on the Racial Wealth Divide. Insight continued its efforts to change state and local policies   |
|         | that unfairly take child support payments from families. Through involvement with the Truth and Justice in Child Support Coalition,  |
|         | Insight helped gain benefits for families that interact with the shill approach with the shill approac |
|         | Insight helped gain benefits for families that interact with the child support system. Finally, we continued to assist the United Way of the Bay Area's campaign to cut poverty in half in the San Francisco Bay Area.   |
|         | The state of the s |
| 4c      | (Code: ) (Expenses \$ 226,327 including grants of \$ ) (Revenue \$ 165,240)  |
|         | Asset Building - Insight promotes policies and programs that halve the ball of the state of the  |
|         | Asset Building - Insight promotes policies and programs that help close the gap in assets between rich and poor communities,   |
|         | women and men, people of diverse races and ethnicities and recent immigrants and the U.S. born, enabling people and communities  |
|         | to acquire, accumulate, and preserve financial and educational assets. In 2021, Insight continued its efforts that focus on debt   |
|         | mechanisms targeting and disproportionately affecting communities of color. As a leader in the Debt Free Justice California Coalition,   |
|         | insignt helped secure the passage of legislation that eliminates 17 additional criminal legal fees and discharges over an estimated  |
|         | \$334 million in debt. By making connections between the racial wealth gap and fines and fees, framing this as a racial and economic   |
|         | justice issue, insight demonstrated to policymakers that the minority communities over-surveilled and targeted by police are the   |
|         | communities that bear the brunt of criminal legal fee debt. Insight also helped secure passage of legislation that curtails the production   |
|         | collection practices used against persons saddled with criminal legal debt, such as wage garnishments and bank legics on minimum   |
|         | wage salaries and minimal pank accounts. Insight publicized its efforts and that of the Coalition with published On Edg in major review  |
|         |  |
|         | outlets, showcashing California as a trailbrazing state in the fight for fines and fees reform. We also conducted a webiner and free   |
|         | outlets, showcashing California as a trailbrazing state in the fight for fines and fees reform. We also conducted a webiner and free   |
| 4d      | outlets, showcasing California as a trailblazing state in the fight for fines and fees reform. We also conducted a webinar and free training for lawyers on the relief available and how to use the new laws, and prepared informational flyers for community groups.  Other program services (Describe on Schedule O.)  |
| 4d      | training for lawyers on the relief available and how to use the new laws, and prepared informational flyers for community groups   |

| Checklist of Required Schedule | 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  |            |          | 1,10     |
| 2   | Is the organization required to complete Schedule B, Schedule of Contributors? See instructions  | 1          | 1        |          |
| 3   | candidates for public office 2 to 10 to 20 | 2          | 1        |          |
| 4   | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a costion 504(b)  | 3          |          | <b>✓</b> |
| 5   | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives memberahin dura-   | 4          | 1        |          |
| 6   | assessments, or similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III  Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advise on the distribution.   | 5          |          | 1        |
|     | "Yes," complete Schedule D, Part I   | 6          |          |          |
| 7   | Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>  |            |          | <b>✓</b> |
| 8   | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III  | 7          |          | <b>✓</b> |
| 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   | 8          | _        | 1        |
| 10  | debt negotiation services? If "Yes," complete Schedule D, Part IV  | 9          |          | 1        |
|     | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? If "Yes," complete Schedule D, Part V.  | 10         |          | /        |
| 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        | ,        |          |
| 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   |            | 1        | ,        |
| 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   | 11b        |          | 1        |
| d   | reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.   | 11c        |          | 1        |
| е   | Did the organization report an amount for other liabilities in Part X line 252 If "Ves." complete School Is D. Dart X  | 11e        |          | 1        |
| 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   |            | ,        | ٧        |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII   | 11f        | <b>✓</b> |          |
| 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  | 12a        | <b>✓</b> |          |
| 13  | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E  | 12b        |          | 1        |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States?  | 13<br>14a  |          | 1        |
| b   | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking  | 14a        |          | V        |
|     | foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV.  | 14b        |          | 1        |
| 15  | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV   | 15         |          |          |
| 16  | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV.  | 2000       |          | <b>✓</b> |
| 17  | Part IX column (A) lines 6 and 1163 if "Yes" assembles 0 of expenses for professional fundraising services on  | 16         |          | <b>✓</b> |
| 18  | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G. Part II   | 17         |          | <u> </u> |
| 9   | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a?  If "Yes," complete Schedule G, Part III  Did the complete Schedule G. Part III   | 18         |          | <b>✓</b> |
| 20a | Did the organization operate one or more hospital facilities? If "Yes " complete Schedule H  | 19         | -        | 1        |
| b   | If Yes to line 20a, did the organization attach a copy of its audited financial statements to this returns   | 20a<br>20b |          | ✓        |
| 21  | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II  |            |          | _        |
|     |  | 21         |          | V        |

| Part         | Checklist of Required Schedules (continued)  | - 111      |     |          |
|--------------|--|------------|-----|----------|
|              |  |            | Yes | No       |
| 22           | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III  | 22         |     | 1        |
| 23           | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J  | 23         | ,   | ·        |
| 24a          | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a   |            | V   | ,        |
| b            | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?  | 24a<br>24b |     | <b>✓</b> |
| С            | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?   | 24c        |     |          |
| d<br>25a     | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I   | 24d        |     | ,        |
| 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  | 25a<br>25b |     | \<br>\   |
| 26           | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>  | 26         |     | <b>V</b> |
| 27           | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III | 27         |     |          |
| 28           | Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):   | 21         |     | _        |
| а            | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV   | 28a        |     | ,        |
| b            | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV  | 28b        |     | <b>V</b> |
| С            | A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If "Yes," complete Schedule L, Part IV   | 28c        |     | /        |
| 29<br>30     | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M  | 29         |     | <b>✓</b> |
| 31<br>32     | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes,"   | 31         |     | <b>✓</b> |
| 33           | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I   | 32         |     | /        |
| 34           | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1   | 33         |     | /        |
| 35a          | Did the organization have a controlled entity within the meaning of section 512(b)(13)?  | 34<br>35a  |     | 1        |
| b            | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2  | 35b        |     |          |
| 36           | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2   | 36         |     | 1        |
| 37           | Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI  | 37         |     | /        |
| 38           | Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O  | 38         | 1   |          |
| Part         | Statements Regarding Other IRS Filings and Tax Compliance Check if Schedule O contains a response or note to any line in this Part V   |            |     |          |
| 4 -          | February 1991 1992 1993  |            | Yes | No       |
| 1a<br>b<br>c | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable   |            |     |          |
|              | reportable gaming (gambling) winnings to prize winners?  | 10         | 1   |          |

| Part   | Statements Regarding Other IRS Filings and Tax Compliance (continued)  |        | Yes | No  |
|--------|--|--------|-----|-----|
| 2a     | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return 7  |        |     |     |
| b      | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .   | 2b     | 1   |     |
|        | Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.  |        |     |     |
| 3a     | Did the organization have unrelated business gross income of \$1,000 or more during the year?  | 3a     |     | 1   |
| b      | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O.   | 3b     |     |     |
| 4a     | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | 4a     |     | 1   |
| b      | If "Yes," enter the name of the foreign country  | Ta     |     | V C |
| D      | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).  |        |     |     |
| 5a     | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  | 5a     |     | 1   |
| b      | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?   | 5b     |     | 1   |
| С      | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?  | 5c     |     |     |
| 6a     | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?                                    |        |     | ,   |
| b      | If "Yes," did the organization include with every solicitation an express statement that such contributions or   | 6a     |     | /   |
| b      | gifts 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 services provided to the payor?  | 7a     |     | 1   |
| b      | If "Yes," did the organization notify the donor of the value of the goods or services provided?  | 7b     |     |     |
| С      | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?   | _      |     | ,   |
| ч      | required to file Form 8282?  | 7c     |     | /   |
| d<br>e | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  | 7e     |     | 1   |
| f      | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?.  | 7f     |     | 1   |
| g      | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?   | 7g     |     |     |
| h      | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?   | 7h     |     |     |
| 8      | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the   |        |     |     |
| •      | sponsoring organization have excess business holdings at any time during the year?   | 8      |     |     |
| 9<br>a | Sponsoring organizations maintaining donor advised funds.  Did the sponsoring organization make any taxable distributions under section 4966?  | 9a     |     |     |
| b      | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  | 9b     |     |     |
| 10     | Section 501(c)(7) organizations. Enter:  |        |     |     |
| a      | Initiation fees and capital contributions included on Part VIII, line 12   |        |     |     |
| b      | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . 10b  |        |     |     |
| 11     | Section 501(c)(12) organizations. Enter:   |        |     |     |
| a<br>b | Gross income from members or shareholders  |        |     |     |
| ~      | against amounts due or received from them.)  | l cell |     |     |
| 12a    | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   | 12a    |     |     |
| b      | If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b  |        |     |     |
| 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    |     |     |
| h      | <b>Note:</b> See the instructions for additional information the organization must report on Schedule O. 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   |        |     |     |
| С      | Enter the amount of reserves on hand   |        |     |     |
| 14a    | Did the organization receive any payments for indoor tanning services during the tax year?   | 14a    | _   | 1   |
| b      | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O.   | 14b    |     | -   |
| 15     | Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?   | 45     |     | ,   |
|        | excess parachute payment(s) during the year?   | 15     |     | 1   |
| 16     | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?  | 16     |     | 1   |
|        | If "Yes," complete Form 4720, Schedule O.  | 10     |     |     |
| 17     | Section 501(c)(21) organizations. Did the trust, any disqualified person, or mine operator engage in any   |        |     |     |
|        | activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?  | 17     |     |     |
|        | If "Yes," complete Form 6069.  |        |     |     |

| Part     |  |        |          | Page     |
|----------|--|--------|----------|----------|
|          | Check if Schedule O contains a response or note to any line in this Part VI  |        |          |          |
| Sect     | ion A. Governing Body and Management   | • •    |          | . [      |
| 1a       | Enter the number of voting members of the governing back at the second of the governing back at the governing back at the second of the governing back at the gove |        | Yes      | No       |
| 1027     | Enter the number of voting members of the governing body at the end of the tax year 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 on Schedule O.  | 6      |          |          |
| b        | Enter the number of voting members included an line of   |        |          |          |
| 2        | any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?  |        |          |          |
| 3        | supervision of officers, directors, trustees, or key employees to a management company or other person?  | 0      |          | 1        |
| 4        | Did the organization make any significant changes to its governing documents since the prior Form 900 was filed.   | 4      | -        | 1        |
| 5        | bid the organization become aware during the year of a significant diversion of the organization's assets?   | 5      |          | 1        |
| 6<br>7a  | Did the organization have members or stockholders?   |        |          | 1        |
| b        | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?   | _      |          | 1        |
|          | Are any governance decisions of the organization reserved to (or subject to approval by) members stockholders, or persons other than the governing body?   |        |          |          |
| 8        | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:  | 7b     |          | 1        |
| а        | the year by the following:  The governing body?  |        |          |          |
| b        | Each committee with authority to act on behalf of the governing body?  | 8a     | 1        |          |
| 9        | the organization's mailing address? If "Yes," provide the names and addresses on Schedule O  |        | 1        |          |
| Secti    | on B. Policies (This Section B requests information about policies not required by the Internal Reve   | 9      | ode l    | <b>✓</b> |
|          |  | nue o  | Yes      |          |
| 10a      | Did the organization have local chapters, branches, or affiliates?   | 10a    | 103      | 1        |
| b        | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?   | 401-   |          |          |
| 11a<br>b | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filling the form?   | 11a    | 1        |          |
| 12a      | Describe on Schedule O the process, if any, used by the organization to review this Form 990.  |        |          |          |
| b        | Did the organization have a written conflict of interest policy? <i>If "No," go to line 13</i> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?   | 12a    | 1        |          |
| C        | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done.  |        | <b>√</b> |          |
| 13       | bid the organization have a written whistleblower policy?  | 12c    | 1        |          |
| 14       | bid the organization have a written document retention and destruction policy?   | 13     | 1        |          |
| 15       | independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?  |        | V        |          |
| a<br>b   | The organization's CEO, Executive Director, or top management official   | 15a    | 1        |          |
| ~        | other officers of key employees of the organization  | 15b    |          | 1        |
| Ioa      | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.  Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?  |        |          |          |
|          | with a taxable entity during the year?   | 16a    |          | 1        |
|          | organization's exempt status with respect to such arrangements?  | 71000  |          |          |
| ectio    | on C. Disclosure   | 16b    |          |          |
| 10       | List the states with which a copy of this Form 990 is required to be filed ► California  Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990  (3)s only) available for public inspection, Indicate bounds and the control of  | T (sec | tion 5   | 01(a)    |
| 19       | Own website Another's website Upon request Other (explain on Schedule O)  Describe on Schedule O whether (and if so, how) the organization made its governing decuments.   |        |          |          |
| 20       | State the name, address, and telephone number of the person who possesses the organization's books and re-   |        |          | ,        |
|          | Brad Caftel, 360 14th Street, Suite 500A, Oakland, CA 94612-3200, 510,466 1703   |        | -        |          |

|  | Form | 990 | (2021) |  |
|--|------|-----|--------|--|
|--|------|-----|--------|--|

## 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 the 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, Form 1099-MISC, and/or box 1 of Form 1099-NEC) 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.

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

| Check this box if neither the organizat |   |  |                       | (       | C)           |                              |            |  | .,   |   |
|---|---|--|-----------------------|---------|--------------|------------------------------|------------|--|--|---|
| (A)<br>Name and title                   | (B) Average hours per week  | Position<br>(do not check mo<br>box, unless perso<br>officer and a direc |                       |         | mor          | e than o                     | an<br>tee) | (D) Reportable compensation                      | (E) Reportable compensation                                    | (F) Estimated amount of other   |
|   | (list any<br>hours for<br>related<br>organizations<br>below<br>dotted line) | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee | Former     | from the organization (W-2/ 1099-MISC/ 1099-NEC) | from related<br>organizations (W-2/<br>1099-MISC/<br>1099-NEC) | compensation<br>from the<br>organization and<br>related organizations |
| (1) Beatriz Stotzer                     | 2.0   |  |                       |         |              |                              |            |  |  |   |
| Chairperson                             |   | 1  |                       | 1       |              |                              |            | 0  | 0  |   |
| (2) Connie Evans                        | 2.0   |  |                       |         |              |                              |            |  | 0  |   |
| Vice Chairperson                        |   | 1  |                       | 1       |              |                              |            | 0  | 0  |   |
| (3) Roberto Barragan                    | 2.0   |  |                       |         |              |                              |            |  | 0  |   |
| Treasurer                               |   | 1  |                       | 1       |              |                              |            | 0  | 0  |   |
| (4) Antonio Manning                     | 2.0   |  |                       |         |              |                              |            |  | 0  |   |
| Secretary                               |   | 1  |                       | 1       |              |                              |            | 0  | 0  |   |
| (5) Josephine Rhymes                    | 2.0   |  |                       |         |              |                              |            |  | 0  |   |
| Director                                |   | 1  |                       |         |              |                              |            | 0  | 0  |   |
| (6) Monica Gonzales                     | 2.0   |  |                       |         |              |                              |            | 0  | U  |   |
| Director                                |   | 1  |                       |         |              |                              |            | 0  | 0  |   |
| (7) Anne E. Price                       | 37.5  |  |                       |         |              |                              |            |  |  |   |
| President                               |   |  |                       | 1       |              |                              |            | 161,962  | 0  | 20.046  |
| (8) Brad Caftel                         | 10.0  |  |                       |         |              |                              |            | 101,302  | - 0  | 30,912  |
| Assistant Secretary                     |   |  |                       | 1       |              |                              |            | 38,844   |  |   |
| (9) Jhumpa Bhattacharya                 | 37.5  |  |                       |         |              | /                            |            |  | 0  | 3,138   |
| (10)                                    |   |  |                       |         |              | •                            |            | 145,134  | 0  | 14,983  |
| (11)                                    |   |  |                       |         |              |                              |            |  |  |   |
| (12)                                    |   |  |                       |         |              |                              | -          |  |  |   |
| (13)                                    |   |  | 9-21                  |         |              |                              | -          |  |  |   |
| (14)                                    |   |  |                       |         | -            |                              | 4          |  |  |   |

|        | (A) Name and title   | (B) Average hours per week  | (do n                          | ot ch                 | Pos<br>neck<br>ss pe | c)<br>sition<br>more | e than o                     | one<br>n an   | (D)  Reportable compensation from the         | (E)  Reportable compensation from related      | (F) Estimated amount of other   |
|--------|--|---|--------------------------------|-----------------------|----------------------|----------------------|------------------------------|---------------|---|--|---|
|        |  | (list any<br>hours for<br>related<br>organizations<br>below<br>dotted line) | Individual trustee or director | Institutional trustee | Officer              | Key employee         | Highest compensated employee | Former        | organization (W-2/<br>1099-MISC/<br>1099-NEC) | organizations (W-2/<br>1099-MISC/<br>1099-NEC) | compensation<br>from the<br>organization and<br>related organizations |
| (15)   |  |   |                                |                       |                      |                      | D.                           |               |   |  |   |
| (16)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (17)   |  |   |                                |                       |                      |                      |                              | 6             |   |  |   |
| (18)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (19)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (20)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (21)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (22)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
|        |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (23)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| (24)   |  |   | -                              |                       |                      |                      |                              |               |   |  |   |
| (25)   |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| С      | Subtotal   | VII, Section  | n A                            |                       |                      |                      |                              | <b>&gt;</b>   | 345,940                                       |  | ,   |
| 2<br>2 | Total (add lines 1b and 1c) Total number of individuals (including bu reportable compensation from the organ | t not limited   | d to th                        | nose                  | e lis                | ted                  | above                        | e) w          | 345,940<br>tho received mor                   | e than \$100,000                               | 49,033<br>of  |
| 3      | Did the organization list any former employee on line 1a? If "Yes," complete                                 | officer, dire   |                                |                       |                      |                      |                              | mp            | loyee, or highes                              | st compensated                                 | Yes No  |
| 4      | For any individual listed on line 1a, is the organization and related organizations individual               | sum of re   | porta<br>an \$                 | ble<br>150            | cor<br>,000          | npe                  | nsatio                       |               |   |  |   |
| 5      | Did any person listed on line 1a receive of for services rendered to the organization                        | or accrue co  | ompe                           | nsa                   | tion                 | fro                  | m any<br>ule J               | y ur<br>for s | _   | tion or individua                              | 1 5 1   |
| Secti  | on B. Independent Contractors  |   |                                |                       |                      |                      |                              |               |   |  |   |
| 1      | Complete this table for your five high compensation from the organization. Rep                               | nest comport comper   | ensat<br>nsatio                | ed<br>n fo            | ind<br>r th          | epe<br>e ca          | ndent<br>Ilenda              | rye           | ontractors that ear ending with or            | received more                                  | than \$100,000 o  |
|        | (A)<br>Name and business add   |   |                                |                       |                      |                      |                              | Ť             | (B)<br>Description of ser                     |  | (C)<br>Compensation   |
|        |  |   |                                |                       |                      |                      |                              |               |   |  |   |
|        |  |   |                                |                       |                      |                      |                              |               |   |  |   |
| 2      | Total number of independent contractor received more than \$100,000 of compens                               |   |                                |                       |                      |                      |                              | o th          | nose listed abov                              | ve) who  |   |

| Par   | <b>MV</b> St | Statement of Re                        | veni         | 16                  |          |                   |                      |  |                                      | Page S                              |
|---|--------------|--|--------------|---------------------|----------|-------------------|----------------------|--|--------------------------------------|-------------------------------------|
| 1000  | 0 0000       | Check if Schedule                      |              |                     | espor    | ise or note to an | v line in this Da    | art \/III  |                                      |                                     |
|   |              |  |              |                     |          | is or mote to dir | (A)<br>Total revenue | (B) Related or exempt function revenue   | (C)<br>Unrelated<br>business revenue | (D) Revenue excluded from tax under |
| is,   | 1a           | Federated campaig                      | ans .        |                     | 1a       | I I               |                      |  |                                      | sections 512-514                    |
| Contributions, Gifts, Grants, and Other Similar Amounts | b            | Membership dues                        |              |                     | 1b       |                   |                      |  |                                      |                                     |
| D U   | С            | Fundraising events                     |              |                     | 1c       |                   |                      | and the same of th |                                      |                                     |
| Gifts,  | d            | Related organizatio                    | ns .         |                     | 1d       |                   |                      |  |                                      |                                     |
| niie  | е            | Government grants                      | (con         | tributions)         | 1e       | 110,000           |                      |  |                                      |                                     |
| Sir   | f            | All other contributio                  | ns, g        | ifts, grants,       |          |                   |                      |  |                                      |                                     |
| Contributions,<br>and Other Sim                         |              | and similar amounts n                  |              |                     | 1f       | 1,049,393         |                      |  |                                      |                                     |
| t to  | g            | Noncash contributions 1a-1f            |              |                     |          |                   |                      |  |                                      |                                     |
| hor   |              |  |              |                     | 1g       | \$                |                      |  |                                      |                                     |
| 0 .0  | n            | Total. Add lines 1a-                   | -1t .        |                     | · ·      |                   | 1,159,393            |  |                                      |                                     |
| ø   | 2a           | Fee for service rever                  |              |                     |          | Business Code     |                      |  |                                      |                                     |
| Z W   | - 00         | ree for service rever                  | nue          |                     |          | 541900            | 277,515              | 277,515  |                                      |                                     |
| Se  | C            |  |              |                     |          |                   |                      |  |                                      |                                     |
| gram Ser<br>Revenue                                     | d            |  |              |                     |          |                   |                      |  |                                      |                                     |
| Program Service<br>Revenue                              | е            |  | ~~~~~        |                     |          |                   |                      |  |                                      |                                     |
| Pro   | f            | All other program so                   | ervice       | e revenue .         |          |                   |                      |  |                                      |                                     |
|   | g            | Total. Add lines 2a-                   | -2f .        |                     |          |                   | 277,515              |  |                                      |                                     |
| A 11 11 12 12 1   | 3            | Investment income                      | (inc         | luding divid        | dends    | , interest, and   | 277,513              |  |                                      |                                     |
|   |              | other similar amoun                    | nts).        |                     |          | >                 | 285                  | 0  | 0                                    | 205                                 |
|   | 4            | Income from investr                    | ment :       | of tax-exem         | pt bo    | nd proceeds >     |                      |  | 0                                    | 285                                 |
|   | 5            | Royalties                              |              |                     |          | >                 |                      |  |                                      |                                     |
|   |              |  |              | (i) Real            |          | (ii) Personal     |                      |  |                                      |                                     |
|   | 6a           | Gross rents                            | 6a           |                     |          |                   |                      |  |                                      |                                     |
|   | b            | Less: rental expenses                  | -            |                     |          |                   |                      |  |                                      |                                     |
|   | C            | Rental income or (loss)                |              |                     |          |                   |                      |  |                                      |                                     |
|   | d            | Net rental income o                    | r (los       | 1                   |          | >                 |                      |  |                                      |                                     |
|   | 7a           | Gross amount from sales of assets      |              | (i) Securit         | ies      | (ii) Other        |                      |  |                                      |                                     |
|   |              | other than inventory                   | 7a           |                     |          |                   |                      |  |                                      |                                     |
| ۵   | b            | Less: cost or other basis              | 1 a          |                     |          |                   |                      |  |                                      |                                     |
| enne  |              | and sales expenses .                   | 7b           |                     |          |                   |                      |  |                                      |                                     |
|   | С            | Gain or (loss)                         |              |                     |          |                   |                      |  |                                      |                                     |
| <u>j.</u>   | d            | Net gain or (loss)                     |              |                     |          | >                 |                      |  |                                      |                                     |
| Other Rev   | 8a           | Gross income from                      | m fu         | ndraisina           |          |                   |                      |  |                                      |                                     |
| 0   |              | events (not including                  | \$           |                     |          |                   |                      |  |                                      |                                     |
|   |              | of contributions rep                   | ported       | d on line           |          |                   |                      |  |                                      |                                     |
|   |              | 1c). See Part IV, line                 |              |                     | 8a       |                   |                      |  |                                      |                                     |
|   | 1 200        | Less: direct expense                   | es .         | : : : . !           | 8b       |                   |                      |  |                                      |                                     |
|   | 9a           | Net income or (loss)<br>Gross income f | from         | tundraising         | g eve    | nts D             |                      |  |                                      |                                     |
|   | ou           | activities. See Part I                 | V line       | e 19 .              | 00       |                   |                      |  |                                      |                                     |
|   | b            | Less: direct expense                   |              | C - 1000 C - 1000 C | 9a<br>9b |                   |                      |  |                                      |                                     |
|   |              | Net income or (loss)                   |              |                     |          | s D               |                      |  |                                      |                                     |
|   | 10a          | Gross sales of in                      | vento        | orv. less           | Tivitie  | 3                 |                      |  |                                      |                                     |
|   |              | returns and allowand                   | ces          |                     | 10a      |                   |                      |  |                                      |                                     |
|   | b            | Less: cost of goods                    | sold         |                     | 10b      |                   |                      |  |                                      |                                     |
|   | С            | Net income or (loss)                   | from         | sales of in         |          | ry D              |                      |  |                                      |                                     |
| Sn  |              |  | real control |                     |          | Business Code     |                      |  |                                      |                                     |
| eo  | 11a          | Employee Retention                     | Tax C        | redit               |          | 541900            | 47,870               | 47,870   |                                      |                                     |
| llan  | b            |  |              |                     |          |                   |                      | .,,0,0   |                                      |                                     |
| Miscellaneous<br>Revenue                                | C            | A.11 .1                                |              |                     |          |                   |                      |  |                                      |                                     |
| N N   |              |  |              |                     |          |                   |                      |  |                                      |                                     |
|   | 12           | Total Add lines 11a                    | -11d         |                     |          |                   | 47,870               |  |                                      |                                     |
| -   | 1 /2         | Total revenue. See                     | IIISTIL      | ictions .           |          | >                 | 1 485 063            | 325 385  | 0                                    |                                     |

# Part IX Statement of Functional Expenses

| ection 501(c)(3) and 501(c)(4) | organizations must complete all column | ns. All other organizations must complete column (A).   |
|--------------------------------|--|---|
|                                |  | The state of garneations in act complete condition (A). |

|                 | Check if Schedule O contains a response   | or note to any line   | in this Part IX .  |                                     | 🗸                              |
|-----------------|---|-----------------------|--|-------------------------------------|--------------------------------|
| Do no<br>8b, 9l | ot include amounts reported on lines 6b, 7b,<br>b, and 10b of Part VIII.  | (A)<br>Total expenses | (B) Program service expenses   | (C) Management and general expenses | (D)<br>Fundraising<br>expenses |
| 1               | Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 .  | 0                     |  | general expenses                    | expenses                       |
| 2               | Grants and other assistance to domestic individuals. See Part IV, line 22   | 0                     | 0  |                                     |                                |
| 3               | Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16  | 0                     | 0  |                                     |                                |
| 4<br>5          | Benefits paid to or for members Compensation of current officers, directors, trustees, and key employees  | 234,856               | 198,918  | 21,779                              | 14.150                         |
| 6               | Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)  | 0                     | 130,510  | 21,779                              | 14,159                         |
| 7               | Other salaries and wages  | 436,549               | 200 740  | 10.400                              | 0                              |
| 8               | Pension plan accruals and contributions (include  | 430,343               | 369,748  | 40,483                              | 26,318                         |
|                 | section 401(k) and 403(b) employer contributions)   | 40.000                |  |                                     |                                |
| 9               | Other employee benefits   | 42,282                | 35,813   | 3,921                               | 2,548                          |
| 10              | Payroll taxes   | 26,432                | 22,391   | 2,451                               | 1,590                          |
| 11              | Fees for services (nonemployees):   | 47,063                | 39,862   | 4,363                               | 2,838                          |
|                 |   |                       |  |                                     |                                |
| a               | Management  | 0                     | 0  | 0                                   | 0                              |
| b               | Legal   | 0                     | 0  | 0                                   | 0                              |
| C               | Accounting  | 34,186                | 0  | 34,186                              | 0                              |
| d               | Lobbying  | 0                     | 0  | 0                                   | 0                              |
| e               | Professional fundraising services. See Part IV, line 17   | 0                     |  |                                     | 0                              |
| f               | Investment management fees  | 0                     | 0  | 0                                   | 0                              |
| g               | Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)   |                       |  |                                     |                                |
|                 |   | 349,749               | 307,875  | 41,874                              | 0                              |
| 12              | Advertising and promotion   | 0                     | 0  | 0                                   | 0                              |
| 13              | Office expenses   | 19,425                | 16,454   | 1,801                               | 1,170                          |
| 14              | Information technology  | 24,279                | 0  | 24,279                              | 0                              |
| 15              | Royalties   | 0                     | 0  | 0                                   | 0                              |
| 16              | Occupancy   | 35,164                | 29,784   | 3,260                               | 2,120                          |
| 17              | Travel  | 12,902                | 11,331   | 952                                 | 619                            |
| 18              | Payments of travel or entertainment expenses  |                       |  |                                     | 0.0                            |
|                 | for any federal, state, or local public officials   | 0                     | 0  | 0                                   | 0                              |
| 19              | Conferences, conventions, and meetings .  | 0                     | 0  | 0                                   | 0                              |
| 20              | Interest  | 0                     | 0  | 0                                   | 0                              |
| 21              | Payments to affiliates  | 0                     | 0  | 0                                   | 0                              |
| 22              | Depreciation, depletion, and amortization .   | 1,110                 | 940  | 103                                 | 67                             |
| 23              | Insurance   | 4,701                 | 3,982  | 436                                 | 283                            |
| 24              | Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column   |                       |  |                                     |                                |
|                 | (A), amount, list line 24e expenses on Schedule O.)   |                       |  |                                     |                                |
| а               |   |                       |  |                                     |                                |
| b               |   |                       |  |                                     |                                |
| С               |   |                       |  |                                     |                                |
| d               |   |                       |  |                                     |                                |
| е               | All other expenses  | 7,445                 | 6,306  |                                     |                                |
| 25              | Total functional expenses. Add lines 1 through 24e  | 1,276,143             | The second secon | 689                                 | 450                            |
| 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) | 1,210,143             | 1,043,404  | 180,577                             | 52,162                         |

Part X Balance Sheet
Check if Schedule O c

|                             |       | Check it Schedule O contains a response or note to any line in this Par  | t X                      |     | 🔲                  |
|-----------------------------|-------|--|--------------------------|-----|--------------------|
|                             |       |  | (A)<br>Beginning of year |     | (B)<br>End of year |
|                             | 1     | Cash—non-interest-bearing  | 874,806                  | 1   | 914,591            |
|                             | 2     | Savings and temporary cash investments   | 19,238                   |     | 518,153            |
|                             | 3     | Pledges and grants receivable, net   | 0                        |     | 194,600            |
|                             | 4     | Accounts receivable, net   | 5,335                    |     | 15,125             |
|                             | 5     | Loans and other receivables from any current or former officer, director,  |                          |     | 10,120             |
|                             |       | trustee, key employee, creator or founder, substantial contributor, or 35%   |                          |     |                    |
|                             | 50.00 | controlled entity or family member of any of these persons   | 0                        | 5   | 0                  |
|                             | 6     | Loans and other receivables from other disqualified persons (as defined  |                          |     |                    |
|                             |       | under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .  | 0                        | 6   | 0                  |
| ts                          | 7     | Notes and loans receivable, net  | 0                        | _   | 0                  |
| Assets                      | 8     | Inventories for sale or use  | 0                        |     | 0                  |
| Ä                           | 9     | Prepaid expenses and deferred charges  | 7,132                    |     |                    |
|                             | 10a   | Land, buildings, and equipment: cost or other  | 7,132                    | 9   | 8,768              |
|                             |       | basis. Complete Part VI of Schedule D 10a 12,121   |                          |     |                    |
|                             | b     | Less: accumulated depreciation   | 2 252                    | 100 |                    |
|                             | 11    | Investments—publicly traded securities   | 3,353                    | 11  | 10,341             |
|                             | 12    | Investments—other securities. See Part IV, line 11   | 0                        |     | 0                  |
|                             | 13    | Investments—program-related. See Part IV, line 11  |                          |     | 0                  |
|                             | 14    | Intangible assets  | 0                        |     | 0                  |
|                             | 15    | Other assets. See Part IV, line 11   | 0                        |     | 0                  |
|                             | 16    | Total assets. Add lines 1 through 15 (must equal line 33)  | 19,393                   |     | 18,693             |
|                             | 17    | Accounts payable and accrued expenses  | 929,257                  |     | 1,680,271          |
|                             | 18    | Grants payable   | 63,162                   |     | 605,256            |
|                             | 19    | Deferred revenue   | 0                        |     | 0                  |
|                             | 20    | Tax-exempt bond liabilities  | 0                        |     | 0                  |
|                             | 21    | Escrow or custodial account liability. Complete Part IV of Schedule D  | 0                        |     | 0                  |
| S                           | 22    | Loans and other payables to any current or former officer, director,   | 0                        | 21  | 0                  |
| tie                         |       | trustee, key employee, creator or founder, substantial contributor, or 35%   |                          |     |                    |
| pi                          |       | controlled entity or family member of any of these persons   |                          |     |                    |
| Liabilities                 | 23    | The state of the s | 0                        |     | 0                  |
|                             | 24    | Secured mortgages and notes payable to unrelated third parties Unsecured notes and loans payable to unrelated third parties  | 0                        |     | 0                  |
|                             | 25    | Other liabilities (including federal income tax, payables to related third   | 0                        | 24  | 0                  |
|                             |       | parties, and other liabilities not included on lines 17–24). Complete Part X   |                          |     |                    |
|                             |       | of Schedule D  |                          |     |                    |
|                             | 26    | Total liabilities. Add lines 17 through 25   | 0                        |     | 0                  |
| S                           |       | Organizations that follow FASB ASC 958, check here ▶ ✓   | 63,162                   | 26  | 605,256            |
| Net Assets or Fund Balances |       | and complete lines 27, 28, 32, and 33.   |                          |     |                    |
| a                           | 27    | Net assets without donor restrictions  | 105 704                  | 07  |                    |
| m                           | 28    | Net assets with donor restrictions   | 185,701                  |     | 606,849            |
| 밀                           |       | Organizations that do not follow FASB ASC 958, check here ▶ ☐  | 680,394                  | 28  | 468,166            |
| 띠                           |       | and complete lines 29 through 33.  |                          |     |                    |
| 0                           | 29    | Capital stock or trust principal, or current funds   |                          | 20  |                    |
| ets                         | 30    | Paid-in or capital surplus, or land, building, or equipment fund   |                          | 29  |                    |
| SS                          | 31    | Retained earnings, endowment, accumulated income, or other funds   |                          | 30  |                    |
| et /                        | 32    | Total net assets or fund balances  | 200.65-                  | 31  |                    |
| ž                           | 33    | Total liabilities and net assets/fund balances   | 866,095                  |     | 1,075,015          |
|                             |       | The designation of the second  | 929,257                  | 33  | 1,680,271          |

| Par     | t XI Reconciliation of Net Assets   |    | Pi       | age 12           |
|---------|---|----|----------|------------------|
|         | 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)   |    | - 11 / B | . 🗆              |
| 2       | rotal expenses (must equal Part IX, column (A), line 25)  |    |          | 85,063           |
| 3       | Revenue less expenses. Subtract line 2 from line 1  |    |          | 76,143           |
| 4       | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (Δ))   |    |          | 08,920<br>66,095 |
| 5       | Net unrealized gains (losses) on investments  |    | 01       | 00,000           |
| 6       | Donated services and use of facilities  |    |          | -                |
| 7       | investment expenses   |    |          |                  |
| 8       | Prior period adjustments  |    |          | 0                |
| 9<br>10 | Other changes in net assets or fund balances (explain on Schedule O)  |    |          | 0                |
| 10      | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line  |    |          |                  |
| Dan     | 32, column (B))   |    | 1,07     | 75,015           |
| rai     |   |    |          |                  |
|         | Check if Schedule O contains a response or note to any line in this Part XII  |    |          |                  |
| 1       | Accounting method used to propers the Fermi coo. To   |    | Yes      | No               |
|         | Accounting method used to prepare the Form 990:  Cash Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.                                 |    |          |                  |
| 2a      | Were the organization's financial statements compiled or reviewed by an independent accountant?   | 0- |          | ,                |
|         | 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:   | 2a |          | 1                |
|         | ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis  |    |          |                  |
| b       | Were the organization's financial statements audited by an independent accountant?  | 01 | ,        |                  |
|         | 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:  | 2b | 1        |                  |
|         | ☑ 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 every list of   |    |          |                  |
|         | the audit, review, or compilation of its financial statements and selection of an independent accountant?   |    | ,        |                  |
|         | if the organization changed either its oversight process or selection process during the tay year explain on  | 2c | /        |                  |
|         | Schedule O.   |    |          |                  |
| 3a      | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the   |    |          |                  |
|         | Single Addit Act and Olvib Circular A-133?  | 3a |          | 1                |
| 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 on Schedule O and describe any steps taken to undergo such audits. | Ja |          | · ·              |
|         | any steps taken to undergo such audits .  | 3b |          |                  |
|         |   | F  | agn      | (0004)           |

## SCHEDULE A (Form 990)

**Public Charity Status and Public Support** 

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust. ► Attach to Form 990 or Form 990-EZ.

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

Name of the organization Insight Center for Community Economic Development

Employer identification number

| Pa    | Reason for Public Cl  | narity Status.                               | All organizations mu  | et comr                        | loto this                             | 94-2  | 410277   |
|-------|---|--|---|--------------------------------|---------------------------------------|---|--|
| The   | organization is not a private four  | dation because                               | it is: (For lines 1 through   | th 12 ch                       | ack only                              | part.) See instruct                                     | ions.  |
| 1     | A church, convention of chu   | rches, or associ                             | ation of churches desc  | rihad in                       | section 1                             | 70/b)/4\/A\/:\  |  |
| 2     | A school described in section   | on 170(b)(1)(A)(ii                           | i). (Attach Schedule E  | Form 99                        | or i                                  | /0(b)(1)(A)(i).   |  |
| 3     | ☐ A hospital or a cooperative   | nospital service of                          | organization described  | in coatie                      | n 170/h                               | (4\/A\/:::\   |  |
| 4     | A medical research organization   | ation operated in                            | conjunction with a hos  | enital des                     | cribed in                             | (1)(A)(III).  | V:::   |
|       |   |  |   |                                |                                       |   |  |
| 5     | An organization operated for section 170(b)(1)(A)(iv). (Co  | or the benefit of                            | a college or university   | owned                          | or operat                             | ed by a governmer                                       | ital unit described in                               |
| 6     | A federal, state, or local gov  | ernment or gove                              | rnmental unit describe  | d in sect                      | ion 170/h                             | V4VAV4.4  |  |
| 7     | described in section 170(b)   | ly receives a sult (1)(A)(vi). (Complete (1) | ostantial part of its sup<br>lete Part II.)   | oport fro                      | m a gove                              | rnmental unit or from                                   | m the general public                                 |
| 8     | A community trust described   | d in section 170                             | (b)(1)(A)(vi). (Complete  | Part II.)                      |                                       |   |  |
| 9     | An agricultural research orga<br>or university or a non-land-g<br>university:   | anization describ<br>rant college of a       | ed in <b>section 170(b)(1</b><br>griculture (see instructi                          | <b>)(A)(ix)</b> o<br>ions). En | er the na                             | me, city, and state o                                   | f the college or                                     |
| 10    | An organization that normall receipts from activities relate support from gross investme acquired by the organization | ent income and                               | prolated business tour  | ertaili ext                    | reptions;                             | and (2) no more than                                    | p fees, and gross<br>n 331/3% of its<br>n businesses |
| 11    | An organization organized a   | nd operated excl                             | usively to test for publi   | ic safety                      | Soo soo                               | art III.)   |  |
| 12    | An organization organized an  | d operated exclu                             | sively for the benefit of   | to norfo                       | rm the fin                            | antinua of out  |  |
|       | one of more publicly support  | eu organizations                             | described in section 5  | no(a)(1)                       | or coation                            | - E00/-1/01 0   |  |
|       | and box of mics that through  | 120 that describe                            | es the type of supporting   | g organiz                      | ation and                             | complete lines 12a                                      | 10f and 10a  |
| а     | Type I. A supporting organization. Type I. A supporting organization.   | anization operate<br>on(s) the power t       | ed, supervised, or cont<br>o regularly appoint or a                                 | rolled by                      | its suppo                             | rtod organization(-)                                    | 4  |
| b     |   | anization superv                             | rised or controlled in co   | nnection                       | with ito                              | supported organizat<br>that control or man              | ion(s), by having<br>age the supported               |
| С     | Type III functionally inte  | grated. A suppo                              | orting organization one   | rated in                       | connectio                             | n with, and function                                    | ally integrated with,                                |
| d     | Type III non-functionally that is not functionally int requirement (see instructional see instructions)               | <b>/ integrated.</b> A segrated. The org     | supporting organization   | operate                        | d in conn                             | ection with its support                                 | orted organization(s)<br>nd an attentiveness         |
| е     | ☐ Check this box if the orgation functionally integrated, or  | anization received                           | d a written determination   | on from t                      | he IRS th                             | at it is a Type I, Type                                 |  |
| f     | Enter the number of supported   | organizations                                |   |                                | organizat                             | ion.  |  |
| g     | Provide the following information   | on about the sup                             | ported organization(s)  |                                |                                       |   | 10.60  |
|       | (i) Name of supported organization  | (ii) EIN                                     | (iii) Type of organization<br>(described on lines 1–10<br>above (see instructions)) | (iv) Is the listed in yo       | organization<br>ur governing<br>ment? | (v) Amount of monetary<br>support (see<br>instructions) | (vi) Amount of other support (see instructions)      |
| _     |   |  |   | Yes                            | No                                    |   |  |
| (A)   |   |  |   |                                |                                       |   |  |
| (B)   |   |  |   |                                |                                       |   |  |
| (C)   |   |  |   |                                |                                       |   |  |
| (D)   |   |  |   |                                |                                       |   |  |
| (E)   |   |  |   |                                |                                       |   |  |
| Total |   |  |   |                                |                                       |   |  |

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Page 2 Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) Part II (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.) Section A. Public Support Calendar year (or fiscal year beginning in) (a) 2017 **(b)** 2018 (c) 2019 (d) 2020 (e) 2021 (f) Total 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . 649,371 1,069,552 1,484,074 1,043,129 1,207,263 5,453,389 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . 0 0 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . 4 Total. Add lines 1 through 3 . . . . 649,371 1,069,552 1,484,074 1,043,129 1,207,263 5,453,389 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) . . . . 2,809,518 Public support. Subtract line 5 from line 4 2,643,871 Section B. Total Support Calendar year (or fiscal year beginning in) (a) 2017 (b) 2018 (c) 2019 (d) 2020 (e) 2021 (f) Total 7 Amounts from line 4 . . . . . . 649,371 1,069,552 1,484,074 1,043,129 1,207,263 5,453,389 8 Gross income from interest, dividends, payments received on securities loans. rents, royalties, and income from similar sources . . . . . . . 74 120 45 18 285 542 9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . . . 0 0 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . . . . 0 11 Total support. Add lines 7 through 10 5,453,931 Gross receipts from related activities, etc. (see instructions) 12 12 740,014 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) 13 organization, check this box and stop here Section C. Computation of Public Support Percentage Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f)) . . . . 14 48.48 % 15 331/3% support test-2021. If the organization did not check the box on line 13, and line 14 is 331/3% or more, check this 331/3% support test-2020. If the organization did not check a box on line 13 or 16a, and line 15 is 331/3% or more, check 10%-facts-and-circumstances test-2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported 10%-facts-and-circumstances test-2020. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported 

Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see

#### Schedule B (Form 990)

Department of the Treasury Internal Revenue Service

## **Schedule of Contributors**

► Attach to Form 990 or Form 990-PF.

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

OMB No. 1545-0047

2021

Name of the organization

Insight Center for Community Economic Development

Organization type (check one):

Employer identification number
94-2410277

| Filers             | of:   | Section:   |  |  |  |  |  |
|--------------------|---|--|--|--|--|--|--|
| Form 990 or 990-EZ |   | ✓ 501(c)( 3 ) (enter number) organization  |  |  |  |  |  |
|                    |   | 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation   |  |  |  |  |  |
|                    |   | ☐ 527 political organization   |  |  |  |  |  |
| Form 990-PF        |   | 501(c)(3) exempt private foundation  |  |  |  |  |  |
|                    |   | 4947(a)(1) nonexempt charitable trust treated as a private foundation  |  |  |  |  |  |
|                    |   | ☐ 501(c)(3) taxable private foundation   |  |  |  |  |  |
| Note: (<br>instruc | Only a section 501(c)<br>tions.                                   | s covered by the <b>General Rule</b> or a <b>Special Rule.</b> (7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See  |  |  |  |  |  |
| Genera             | al Rule   |  |  |  |  |  |  |
|                    | For an organization or more (in money contributor's total         | or filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributions.   |  |  |  |  |  |
| Specia             | Rules   |  |  |  |  |  |  |
| <b>V</b>           | 16b, and that recei   | n described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33½% support test of the sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or ved from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or any one one total viii, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.  |  |  |  |  |  |
|                    | literary, or education  | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, anal purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering instead of the contributor name and address), II, and III.  |  |  |  |  |  |
|                    | contributions totale<br>during the year for<br>General Rule appli | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one the year, contributions exclusively for religious, charitable, etc., purposes, but no such and more than \$1,000. If this box is checked, enter here the total contributions that were received an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the es to this organization because it received nonexclusively religious, charitable, etc., contributions more during the year |  |  |  |  |  |

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Insight Center for Community Economic Development

Employer identification number

94-2410277

| Part I     | Contributors (see instructions). Use duplicate of                                       | opies of Part I if additional space is | needed.   |
|------------|---|--|---|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions             | (d)<br>Type of contribution   |
|            | W.K. Kellogg Foundation  One Michigan Avenue East  Battle Creek, MI 49017-4012          |  | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions             | (d)<br>Type of contribution   |
| 2          | The California Endowment  1000 North Alameda Street  Los Angeles, CA 90012              | \$ 194,600                             | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions                | (d) Type of contribution  |
| 3          | Arnold Ventures 620 Eighth Avenue New York, NY 10018                                    |  | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions             | (d)<br>Type of contribution   |
| 4          | U.S. Small Business Administration  409 3rd Street SW  Washington, DC 20416             |  | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions             | (d)<br>Type of contribution   |
| 5<br>(a)   | New Venture Fund  1201 Connecticut Avenue NW Suite 300  Washington, DC 20036            | \$ 100,000                             | Person Payroll Noncash  (Complete Part II for noncash contributions.) |
| No.        | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions             | (d)<br>Type of contribution   |
| 6          | The San Francisco Foundation  1 Embarcadero Center, Suite 1400  San Francisco, CA 94111 | \$ 75,000                              | Person Payroll Noncash  (Complete Part II for noncash contributions.) |

Insight Center for Community Economic Development

Employer identification number

94-2410277

| Part I     | Contributors (see instructions). Use duplicate copies of                        | of Part I if additional space is | needed.   |
|------------|---|----------------------------------|---|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
| 7<br>(a)   | Walter & Elise Haas Fund  One Lombard Street Suite 305  San Francisco, CA 94111 | \$51,000                         | Person  |
| No.        | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
| 8          | Hopewell Fund  1201 Connecticut Avenue NW, Suite 300  Washington, DC 20036      | \$50,000                         | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
| 9          | Y&H Soda Foundation  1635 School Street  Moraga, CA 94556                       | \$50,000                         | Person Payroll Noncash  (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
| 10         | Time's Up Foundation  1800 M Street NW  Washington, DC 20033                    | \$50,000                         | Person Payroll Noncash (Complete Part II for noncash contributions.)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
|            | The Annie E. Casey Foundation  701 St. Paul Street  Baltimore, MD 21202         | \$ 50,000                        | Person Payroll Noncash  (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions       | (d)<br>Type of contribution   |
| 12         | State of California  1325 J Street Suite 1800  Sacramento, CA 95814             | \$25,000                         | Person Payroll Noncash  (Complete Part II for noncash contributions.) |

Employer identification number

94-2410277

| Part II                   | Noncash Property (see instructions). Use duplicate c | opies of Part II if additional spa        | ies of Part II if additional space is needed. |  |  |  |  |
|---------------------------|--|---|---|--|--|--|--|
| (a) No.<br>from<br>Part I | (b)  Description of noncash property given           | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | \$  |   |  |  |  |  |
| (a) No.<br>from<br>Part I | (b)  Description of noncash property given           | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | <br><br>\$                                |   |  |  |  |  |
| (a) No.<br>from<br>Part I | (b)  Description of noncash property given           | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | \$  |   |  |  |  |  |
| (a) No.<br>from<br>Part I | (b)  Description of noncash property given           | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | \$  |   |  |  |  |  |
| (a) No.<br>from<br>Part I | (b) Description of noncash property given            | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | \$  |   |  |  |  |  |
| a) No.<br>from<br>Part I  | (b)  Description of noncash property given           | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received                          |  |  |  |  |
|                           |  | \$  |   |  |  |  |  |

## SCHEDULE C (Form 990)

# **Political Campaign and Lobbying Activities**

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

For Organizations Exempt From Income Tax Under section 501(c) and section 527 ▶ Complete if the organization is described below.
▶ Attach to Form 990 or Form 990-EZ. Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

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

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

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

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

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

| Tax) ( | See separate instructions),                         | then  |                       |   | ==, rare v, inte ooc (Frox)   |
|--------|---|---|-----------------------|---|---|
|        |   | anizations: Complete Part III.  |                       |   |   |
| Name   | of organization                                     |   |                       | Employer ide  | ntification number  |
| Insigh | t Center for Community Ec                           | onomic Development  |                       |   | 94 2410277  |
| Part   | I-A Complete if th                                  | e organization is exempt ur   | der section 501       | (c) or is a section 527   | organization  |
| 1      | Provide a description of definition of political ca | of the organization's direct and mpaign activities."  | indirect political c  | ampaign activities in Par   | t IV. See instructions fo   |
| 2      | Political campaign activi                           | ty expenditures. See instructions   |                       |   | \$  |
| 3      | Volunteer hours for politi                          | cal campaign activities. See inst   | ructions              |   |   |
| Part   | Complete if th                                      | e organization is exempt un   | der section 501       | (c)(3).   |   |
| 1      | Enter the amount of any                             | excise tax incurred by the organ  | ization under section | on 4955   | \$  |
| 2      | Enter the amount of any                             | excise tax incurred by organizati   | on managers unde      | r section 4955  | 5   |
| 3      | If the organization incurr                          | ed a section 4955 tax, did it file F  | orm 4720 for this v   | /ear?   | · · Yes No  |
| 4a     | Was a correction made?                              |   |                       |   | · · Yes No  |
| b      | If "Yes," describe in Part                          | IV.   |                       |   |   |
| Part   | I-C Complete if th                                  | e organization is exempt un   | der section 501       | (c), except section 501   | (c)(3)  |
| 1      | Enter the amount direct                             | tly expended by the filing organ  | nization for section  | 527 exempt function   | . (0)(0).   |
| 2      | Enter the amount of the                             | filing organization's funds conti   | ributed to other or   | ganizations for agetics   | )   |
| •      | Tatal assessed for all                              | ivities   |                       | ▶ \$  | ·   |
| 3      | line 17b  | expenditures. Add lines 1 and   | 2. Enter here and     | d on Form 1120-POL,   |   |
| 4      | Did the filing organization                         | n file Form 1120-POL for this year  | ar?                   |   | · · Yes No  |
| 5      | Enter the names, address                            | ses and employer identification n   | umber (FIN) of all s  | section 527 political organ   | izations to which the fill  |
|        | the amount of political co                          | ents. For each organization listed<br>ontributions received that were poly<br>fund or a political action commit | i, enter the amount   | paid from the filing organ  | ization's funds. Also enter   |
|        | (a) Name  | (b) Address   | (c) EIN               | (d) Amount paid from filing organization's funds. If none, enter -0 | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization.  If none, enter -0 |
| (1)    |   |   |                       |   |   |
| (2)    |   |   |                       |   |   |
| (3)    |   |   |                       |   |   |
| (4)    |   |   |                       |   |   |
| (5)    |   |   |                       |   |   |
| (6)    |   |   | -                     |   |   |

f Grassroots lobbying expenditures

| n 5768 (ele<br>roup memb<br>n) Filing<br>ation's totals<br>0<br>2,400<br>2,400<br>1,273,743<br>1,276,143<br>202,614 | Page Pection under Per's name,  (b) Affiliated group totals |  |  |
|---|---|--|--|
| 0) Filling<br>ation's totals<br>0<br>2,400<br>2,400<br>1,273,743<br>1,276,143<br>202,614                            | (b) Affiliated  |  |  |
| 1,276,143<br>202,614  |   |  |  |
| 1,276,143<br>202,614  |   |  |  |
| 1,276,143<br>202,614  |   |  |  |
| 0<br>2,400<br>2,400<br>1,273,743<br>1,276,143<br>202,614  | g. vap lotting  |  |  |
| 2,400<br>2,400<br>1,273,743<br>1,276,143<br>202,614   |   |  |  |
| 2,400<br>1,273,743<br>1,276,143<br>202,614  |   |  |  |
| 1,273,743<br>1,276,143<br>202,614   |   |  |  |
| 1,276,143<br>202,614  |   |  |  |
| 202,614   |   |  |  |
|   |   |  |  |
|   |   |  |  |
| 50.654  |   |  |  |
| 50.654  |   |  |  |
| 50.654  |   |  |  |
| 50 654  |   |  |  |
| 50.654  |   |  |  |
| 50.654  |   |  |  |
| 50 654  |   |  |  |
|   |   |  |  |
| 0   |   |  |  |
| rm 4720 _   |   |  |  |
| rm 4/20   | Yes No  |  |  |
| ive column  |   |  |  |
|   |   |  |  |
| 2021  | (e) Total   |  |  |
|   |   |  |  |
| 202,614   | 777,836   |  |  |
|   | 1,166,754   |  |  |
| 2,400   | 8,633   |  |  |
|   |   |  |  |
| 50,654  | 194,460   |  |  |
|   | 202,614   |  |  |

Schedule C (Form 990) 2021

291,690

#### SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

# **Supplemental Financial Statements**

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

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

red "Yes" on Form 990, 11d, 11e, 11f, 12a, or 12b.

Open to Public Inspection

OMB No. 1545-0047

Name of the organization

Employer identification number

| Insigh | t Center for Community Economic Development   |   | 94-2410277   |
|--------|---|---|--|
| Ра     | Organizations Maintaining Donor Adv   | ised Funds or Other Similar Fund  | ls or Accounts.  |
|        | Complete if the organization answered "   |   |  |
| 4      | Total number at and of years  | (a) Donor advised funds   | (b) Funds and other accounts   |
| 1      | Total number at end of year   |   |  |
| 2      | Aggregate value of contributions to (during year) .   |   |  |
| 4      | Aggregate value of grants from (during year)  |   |  |
| 5      | Aggregate value at end of year  |   |  |
| 3      | Did the organization inform all donors and donor funds are the organization's property, subject to the  | advisors in writing that the assets he  | and the second s |
| 6      | Did the organization inform all grantees, donors, as only for charitable purposes and not for the benefit   | nd donor advisors in writing that grant   | funds can be used rany other purpose   |
| Pai    | Conservation Easements.   | V"  |  |
| 1      | Complete if the organization answered "   | Yes" on Form 990, Part IV, line 7.  |  |
| •      | Purpose(s) of conservation easements held by the output Preservation of land for public use (for example, recre   |   |  |
|        | Protection of natural habitat   |   | f a historically important land area   |
|        | Preservation of open space  | ☐ Preservation of   | f a certified historic structure   |
| 2      | Complete lines 2a through 2d if the organization he   | ld a qualified conservation contribution  | in the form of a concentation  |
|        | easement on the last day of the tax year.   | is a quanted cortoor valion contribution  |  |
| а      |   |   | Held at the End of the Tax Year  |
| b      | Total acreage restricted by conservation easements  |   | . 2a . 2b  |
| С      | Number of conservation easements on a certified h   | istoric structure included in (a)   | . 20<br>. 2c   |
| d      | Number of conservation easements included in (  | c) acquired after 7/25/06, and not o  | n a  |
| 3      | Number of conservation easements modified, transtax year ▶  |   |  |
| 4      | Number of states where property subject to conserv  | vation easement is located  |  |
| 5      | Does the organization have a written policy reg violations, and enforcement of the conservation eas   | arding the periodic monitoring inspe  |  |
| 6      | Staff and volunteer hours devoted to monitoring, inspec   | eting, handling of violations, and enforcing                                    | conservation easements during the year   |
| 7      | Amount of expenses incurred in monitoring, inspecting  \$ \begin{align*}  \\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \  | g, handling of violations, and enforcing c                                      | conservation easements during the yea  |
| 8      | Does each conservation easement reported on line 2 and section 170(h)(4)(B)(ii)?  | 2(d) above satisfy the requirements of s  |  |
| 9      | In Part XIII, describe how the organization reports of<br>balance sheet, and include, if applicable, the text of<br>organization's accounting for conservation easement | onservation easements in its revenue a the footnote to the organization's final | and expense statement and  |
| Par    | Organizations Maintaining Collections Complete if the organization answered "   | of Art, Historical Treasures, or C  | Other Similar Assets.  |
| 1a     | If the organization elected, as permitted under FAS of art, historical treasures, or other similar assets   | B ASC 958, not to report in its revenue held for public exhibition, education.  | or research in furtherance of public   |
| h      | service, provide in Part XIII the text of the footnote t  | o its ilnancial statements that describe  | es these items.  |
| b      | If the organization elected, as permitted under FAS art, historical treasures, or other similar assets held provide the following amounts relating to these item        | for public exhibition, education, or resease:                                   | earch in furtherance of public service   |
|        | (i) Revenue included on Form 990, Part VIII, line 1 (ii) Assets included in Form 990, Part X If the organization received or held works of art.                         |   | ▶ \$   |
|        | (ii) Assets included in Form 990, Part X  |   | > \$   |
| 2      | following amounts required to be reported under FA  | SB ASC 958 relating to these items:   | assets for financial gain, provide the   |
| a<br>b | Revenue included on Form 990, Part VIII, line 1 . Assets included in Form 990, Part X   |   | • \$   |

| Par        | Urganizations Maintaining  | Collections of Art                   | . His        | torical     | <b>Treasures</b>              | or O      | her Similar As         | cate (con    | tinuad     |
|------------|--|--------------------------------------|--------------|-------------|-------------------------------|-----------|------------------------|--------------|------------|
| 3          | Using the organization's acquisition, a collection items (check all that apply): | ccession, and other                  | reco         | rds, chec   | k any of th                   | e follov  | ving that make s       | ignificant u | ise of its |
| a          | ☐ Public exhibition  |                                      | d            | □ Loan      | or exchang                    | e prog    | ram                    |              |            |
| b          | ☐ Scholarly research   |                                      | e            | Other       | ·                             | je prog   | ani                    |              |            |
| C          | ☐ Preservation for future generations  |                                      |              |             |                               |           |                        |              |            |
| 4          | Provide a description of the organizati XIII.                                    | on's collections and                 | expla        | ain how t   | hey further                   | the or    | ganization's exen      | npt purpos   | e in Part  |
| 5          | During the year, did the organization s  | solicit or receive don               | nation       | o of ort    | biotorical t                  |           |                        |              |            |
|            | assets to be sold to raise funds rather  | than to be maintained                | d as i       | nart of the | nistoricai ti<br>e organizati | reasure   | s, or other simila     |              |            |
| Part       | IV Escrow and Custodial Arrai  | ngements                             |              | part of the | o organizati                  | 1011 3 00 | niection:              | ⊔ Yes        | ☐ No       |
|            | Complete if the organization 990, Part X, line 21.                               | answered "Yes" or                    |              |             |                               |           |                        |              | orm        |
| 1a         | Is the organization an agent, trustee, included on Form 990, Part X?             | custodian or other i                 | ntern        | nediary fo  | or contribut                  | tions or  | other assets no        |              | □ No       |
| b          | If "Yes," explain the arrangement in Pa  | rt XIII and complete t               | the fo       | ollowing to | able:                         |           |                        | mount        |            |
| С          | Beginning balance  |                                      |              | 2 20 727    |                               | 10        |                        | Hourit       |            |
| d          | Additions during the year  |                                      |              |             |                               | 10        |                        |              |            |
| е          | Distributions during the year  |                                      |              |             |                               | 16        |                        |              |            |
| f          | Ending balance   |                                      |              |             |                               | 11        |                        |              |            |
| 2a         | Did the organization include an amount   | t on Form 990, Part X                | K, line      | 21, for e   | scrow or co                   | ustodia   | account liability      | ? Tyes       | □ No       |
| b          | if "Yes," explain the arrangement in Pa  | rt XIII. Check here if t             | the ex       | xplanatio   | n has been                    | provide   | ed on Part XIII .      |              |            |
| Par        | Endowment Funds.   |                                      |              |             |                               |           |                        |              |            |
|            | Complete if the organization   |                                      |              |             |                               |           |                        |              |            |
| 4.         | Parissis of the Late   | (a) Current year                     | (b) Pri      | or year     | (c) Two year                  | rs back   | (d) Three years back   | (e) Four ye  | ars back   |
| 1a         | Beginning of year balance Contributions  |                                      |              |             |                               |           |                        |              |            |
| b          | Net investment earnings, gains, and  |                                      |              |             |                               |           |                        |              |            |
| •          | losses   |                                      |              |             |                               |           |                        |              |            |
| d          | Grants or scholarships   |                                      |              |             |                               |           |                        |              |            |
| e          | Other expenditures for facilities and  |                                      |              |             |                               |           |                        |              |            |
|            | programs   |                                      |              |             |                               |           |                        |              |            |
| f          | Administrative expenses  |                                      |              |             |                               |           |                        |              |            |
| g          | End of year balance  |                                      |              |             |                               |           |                        |              |            |
| 2          | Provide the estimated percentage of the  | e current year end ba                | alanc        | e (line 1g  | , column (a                   | )) held a | as:                    |              |            |
| a<br>b     | Board designated or quasi-endowment  | %                                    |              |             |                               |           |                        |              |            |
|            | Permanent endowment ► Term endowment ► %   | %                                    |              |             |                               |           |                        |              |            |
| •          | The percentages on lines 2a, 2b, and 2a  | c should equal 100%                  | ,            |             |                               |           |                        |              |            |
| 3a         | Are there endowment funds not in the   | possession of the or                 | o.<br>raani: | zation the  | at are hold                   | and ad    | ministers of few th    |              |            |
|            | organization by:   | peccession of the of                 | garnz        | zation the  | at are rield                  | and ad    | ministered for the     |              | - 1        |
|            | (i) Unrelated organizations  |                                      | 20 1         |             |                               |           |                        | 20(i)        | es No      |
|            | (ii) Related organizations   |                                      |              |             | • • • •                       | * * *     |                        | 3a(i)        | +          |
| b          | If "Yes" on line 3a(ii), are the related org                                     | anizations listed as r               | reauir       | red on Sc   | hedule R?                     |           |                        | 3a(ii)<br>3b | +          |
| 4          | Describe in Part XIII the intended uses of                                       | of the organization's                | endo         | wment fu    | ınds.                         |           |                        | 30           |            |
| Part       | Land, Buildings, and Equipn  | nent.                                |              |             |                               |           |                        |              |            |
|            | Complete if the organization a   | answered "Yes" on                    | For          | m 990, F    | art IV, line                  | 11a.      | See Form 990.          | Part X. line | e 10       |
|            | Description of property  | (a) Cost or other ba<br>(investment) | asis         | (b) Cost o  | r other basis<br>ther)        | (c) A     | Accumulated preciation | (d) Book v   |            |
| NAME OF    | Land   |                                      |              |             |                               |           |                        | A.M.         |            |
| b          | Buildings  |                                      |              |             |                               |           |                        |              |            |
| c          | Leasehold improvements   |                                      |              |             |                               |           |                        |              |            |
| d          | Equipment  |                                      |              |             | 12,121                        | 2.00      | 1,780                  |              | 10,341     |
| e<br>Total | Other  | lot oqual Farmanas a                 | 2- :         | ,           | (D) ::                        |           |                        |              |            |
| · Otali    | Add lines 1a through 1e. (Column (d) mu  | isi equal Form 990, F                | art X        | , column    | (B), line 10                  | c.)       | >                      |              | 10,341     |

| Part VII  | Investments - Other Securities.   |                        |                    | 1 age                              |
|---|---|------------------------|--------------------|------------------------------------|
|   | Complete if the organization answered "Yes" on Fo   | orm 990, Part IV, line | 11b. See Form 9    | 90. Part X. line 12                |
| in the second   | (a) Description of security or category (including name of security)  | (b) Book value         | (c) Method         | of valuation: year market value    |
| (1) Financia  | I derivatives   |                        |                    |                                    |
| (2) Closely I   | neld equity interests   |                        |                    |                                    |
| (3) Other   |   |                        |                    |                                    |
|   |   |                        |                    |                                    |
| (B)   |   |                        |                    |                                    |
| (C)   |   |                        |                    |                                    |
| (D)   |   |                        |                    |                                    |
| (E)   |   |                        |                    |                                    |
| (F)<br>(G)  |   | -                      |                    |                                    |
| (H)   |   | -                      |                    |                                    |
|   | mn (b) must equal Form 990, Part X, col. (B) line 12.) . ▶  | -                      |                    |                                    |
| Part VIII   | Investments – Program Related.  |                        |                    |                                    |
|   | Complete if the organization answered "Yes" on Fo   | orm 990 Part IV line   | 110 Coo Form 00    | 00 Dest V 15 40                    |
|   | (a) Description of investment   | (b) Book value         |                    |                                    |
|   |   | (b) book value         |                    | of valuation:<br>year market value |
| (1)   |   |                        |                    |                                    |
| (2)   |   |                        |                    |                                    |
| (3)   |   |                        |                    |                                    |
| (4)   |   |                        |                    |                                    |
| (5)   |   |                        |                    |                                    |
| (6)   |   |                        |                    |                                    |
| (7)   |   |                        |                    |                                    |
| (8)   |   |                        |                    |                                    |
| (9)   | mn (h) must saved Form 000 Post V   |                        |                    |                                    |
| Part IX   | mn (b) must equal Form 990, Part X, col. (B) line 13.) .   Other Assets.  |                        |                    |                                    |
|   | Complete if the organization answered "Yes" on Fo   | orm 000 Port IV line   | 111 0 5 00         |                                    |
|   | (a) Description   | orm 990, Part IV, line | Tra. See Form 98   |                                    |
| (1)   | (A) Docomption  |                        |                    | (b) Book value                     |
| (2)   |   |                        |                    |                                    |
| (3)   |   |                        |                    |                                    |
| (4)   |   |                        |                    |                                    |
| (5)   |   |                        |                    |                                    |
| (6)   |   |                        |                    |                                    |
| (7)   |   |                        |                    |                                    |
| (8)   |   |                        |                    |                                    |
|   |   |                        |                    |                                    |
| (9)   | mp (b) must occurd Form 2000 Port V and (D) (1 15)  |                        |                    |                                    |
| (9)<br>Г <b>otal.</b> (Colui  | mn (b) must equal Form 990, Part X, col. (B) line 15.)  |                        | •                  |                                    |
| (9)   | Other Liabilities.  |                        |                    |                                    |
| (9)<br>Г <b>otal.</b> (Colui  | Other Liabilities.  Complete if the organization answered "Yes" on Fo   | rm 990, Part IV, line  |                    | orm 990, Part X,                   |
| (9)<br>Г <b>otal.</b> (Colui  | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  | rm 990, Part IV, line  |                    | 987                                |
| (9)<br>Fotal. (Colui<br>Part X  | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    | orm 990, Part X,                   |
| (9)  Total. (Column Part X  . (1) Federal in  | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    | 997                                |
| (9)  Total. (Column Part X  (1) Federal in (2)  | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    | 997                                |
| (9) Fotal. (Column Part X  (1) Federal in (2) (3)   | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    | 997                                |
| (9)  Fotal. (Column Part X  1. (1) Federal in (2) (3) (4) (5)                                     | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    | 997                                |
| (9)  Fotal. (Column Part X  (1) Federal in (2) (3) (4) (5) (6)                                    | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    |                                    |
| (9) Part X  (1) Federal in (2) (3) (4) (5) (6) (7)  | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    |                                    |
| (9)  Fotal. (Column Part X  (1) Federal in (2) (3) (4) (5) (6) (7) (8)                            | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              | rm 990, Part IV, line  |                    |                                    |
| (9)  Part X  (1) Federal in (2) (3) (4) (5) (6) (7) (8) (9)                                       | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability accome taxes | rm 990, Part IV, line  |                    |                                    |
| (9)  Fotal. (Column Part X  (1) Federal in (2) (3) (4) (5) (6) (7) (8) (9)  Fotal. (Column Part X | Other Liabilities. Complete if the organization answered "Yes" on Foline 25.  (a) Description of liability              |                        | 11e or 11f. See Fo | (b) Book value                     |

| Par  |  | Return.    | To the second se |
|------|--|------------|--|
| 1    | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.  Total revenue, gains, and other support per audited financial statements  |            |  |
| 2    | Amounts included on line 1 but not on Form 990, Part VIII, line 12:  | 1          | 1,485,063  |
| a    | Not upperlined as in a first transfer of the second |            |  |
| b    | Departed complete and the office (III)   |            |  |
| c    | December of a december of  |            |  |
| d    | Other (Decent) 1 D (1/00)  |            |  |
| е    | Add lines 2a through 2d  |            |  |
| 3    | Subtract line 2e from line 1   | 2e         | 0  |
| 4    | Amounts included on Form 990, Part VIII, line 12, but not on line 1:   | 3          | 1,485,063  |
| а    | Investment expenses not included on Form 990, Part VIII, line 7b 4a  |            |  |
| b    | Other (Describe in Part XIII.)   |            |  |
| С    | Add lines 4a and 4b  | 4c         | 12   |
| 5    | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)  | 5          | 0  |
| Part | Reconciliation of Expenses per Audited Financial Statements With Expenses p  | or Roturn  | 1,485,063  |
| 75   | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.  | er neturn. |  |
| 1    | Total expenses and losses per audited financial statements   | 1          | (A) A  |
| 2    | Amounts included on line 1 but not on Form 990, Part IX, line 25:  |            | 1,276,143  |
| а    | Donated services and use of facilities   |            |  |
| b    | Prior year adjustments   |            |  |
| C    | Other losses   | -          |  |
| d    | Other (Describe in Part XIII.)   |            |  |
| е    | Add lines 2a through 2d  | 2e         | 0  |
| 3    | Subtract line 2e from line 1   | 3          | 1,276,143  |
| 4    | Amounts included on Form 990, Part IX, line 25, but not on line 1:   |            | 1,270,143  |
| а    | Investment expenses not included on Form 990, Part VIII, line 7b 4a  |            |  |
| b    | Other (Describe in Part XIII.)   |            |  |
| C    | Add lines 4a and 4b  | 4c         | 0  |
| 5    | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)   | 5          | 1,276,143  |
| Part | Supplemental Information.  The the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2i  |            |  |
|      | XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional in   |            |  |
|      |  |            |  |
|      |  |            |  |
|      |  |            |  |
|      |  |            |  |
|      |  |            |  |

## SCHEDULE J (Form 990)

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

➤ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

➤ Attach to Form 990.

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

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service Name of the organization

Employer identification number

| Part I Questions Regarding Compensation 94-2410277 |   |  | 277            |     |             |
|--|---|--|----------------|-----|-------------|
|  | adoctions riegarding Compensation   |  |                |     |             |
| 1a   | Check the appropriate box(es) if the organization provided any of the following to or for a page 1990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding First-class or charter travel  Housing allowance or residence for Travel for companions Payments For business use of personal Tax indemnification and gross-up payments Health or social club dues or initiated Discretionary spending account Personal services (such as maid, or | g these items. or personal use sonal residence tion fees |                | Yes | No          |
| b  | If any of the boxes on line 1a are checked, did the organization follow a written policy or reimbursement or provision of all of the expenses described above? If "No," of explain  | complete Part III to                                     | 1b             |     |             |
| 2  | Did the organization require substantiation prior to reimbursing or allowing expendirectors, trustees, and officers, including the CEO/Executive Director, regarding the ite 1a?  | ses incurred by all ems checked on line                  | 2              |     |             |
| 3  | Indicate which, if any, of the following the organization used to establish the compensation organization's CEO/Executive Director. Check all that apply. Do not check any boxes for related organization to establish compensation of the CEO/Executive Director, but explain Compensation committee Written employment contract Independent compensation consultant Compensation survey or study  | methods used by a<br>n in Part III.                      |                |     |             |
| 4  | Form 990 of other organizations  Approval by the board or compens  During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respecting organization or a related organization:  | ect to the filing  |                |     |             |
| a<br>b<br>c  | Receive a severance payment or change-of-control payment?  Participate in or receive payment from a supplemental nonqualified retirement plan?  Participate in or receive payment from an equity-based compensation arrangement?  If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each   |  | 4a<br>4b<br>4c |     | √<br>√<br>√ |
| 5  | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-<br>For persons listed on Form 990, Part VII, Section A, line 1a, did the organization<br>compensation contingent on the revenues of:   | 9.<br>pay or accrue any                                  |                |     |             |
| a<br>b   | The organization?   |  | 5a<br>5b       |     | 1           |
| 6  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization compensation contingent on the net earnings of:  |  |                |     |             |
| a<br>b   | The organization?   |  | 6a<br>6b       |     | √<br>√      |
| 7  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization propayments not described on lines 5 and 6? If "Yes," describe in Part III   | ovide any nonfixed                                       | _              |     | ,           |
| 8  | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract to the initial contract exception described in Regulations section 53.4958-4(a)(3)? in Part III   | that was subject   | 8              |     | <u>√</u>    |
| 9  | If "Yes" on line 8, did the organization also follow the rebuttable presumption proceedings section 53.4958-6(c)?   | edure described in                                       | 9              |     | •           |

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

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

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

|                           |             | (a) DICANDONII DI W-2 AII | (b) Dieardowii of W-2 and/or 1099-MISC and/or 1099-NEC compensation | ogg-IVEO COLLIDERISATION            |  |                         |                                    |  |
|---------------------------|-------------|---------------------------|---|-------------------------------------|--|-------------------------|------------------------------------|--|
| (A) Name and Title        |             | (i) Base<br>compensation  | (ii) Bonus & incentive compensation                                 | (iii) Other reportable compensation | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns<br>(B)(i)–(D) | (F) Compensation<br>in column (B) reported<br>as deferred on prior<br>Form 990 |
|                           | ()          | 161,962                   | 0   | 0                                   | 15,500   | 15,412                  | 192.874                            | 0  |
| 1Anne E. Price, President | €           |                           |   |                                     |  |                         |                                    |  |
|                           | Ξ           |                           |   |                                     |  |                         |                                    |  |
| 2                         | €           |                           |   |                                     |  |                         |                                    |  |
|                           | Ξ           |                           |   |                                     |  |                         |                                    |  |
| 3                         | €           |                           |   |                                     |  |                         |                                    |  |
|                           | ε           |                           |   |                                     |  |                         |                                    |  |
| 4                         | <b>E</b>    |                           |   |                                     |  |                         |                                    |  |
|                           | 8           |                           |   |                                     |  |                         |                                    |  |
| 5                         | (ii)        |                           |   |                                     |  |                         |                                    |  |
|                           | ()          |                           |   |                                     |  |                         |                                    |  |
| 9                         | €           |                           |   |                                     |  |                         |                                    |  |
|                           | 0           |                           |   |                                     |  |                         |                                    |  |
| 7                         | €           |                           |   |                                     |  |                         |                                    |  |
|                           | Θ           |                           |   |                                     |  |                         |                                    |  |
| 8                         | <u></u>     |                           |   |                                     |  |                         |                                    |  |
|                           | (1)         |                           |   |                                     |  |                         |                                    |  |
| 6                         | <b>(i)</b>  |                           |   |                                     |  |                         |                                    |  |
|                           | (i)         |                           |   |                                     |  |                         |                                    |  |
| 10                        | (ii)        |                           |   |                                     |  |                         |                                    |  |
|                           | (i)         |                           |   |                                     |  |                         |                                    |  |
| 1                         | (ii)        |                           |   |                                     |  |                         |                                    |  |
|                           | 0           |                           |   |                                     |  |                         |                                    |  |
| 12                        | <b>(E</b> ) |                           |   |                                     |  |                         |                                    |  |
|                           | ε           |                           |   |                                     |  |                         |                                    |  |
| 13                        | <u>(i)</u>  |                           |   |                                     |  |                         |                                    |  |
|                           | (i)         |                           |   |                                     |  |                         |                                    |  |
| 14                        | (ii)        |                           |   |                                     |  |                         |                                    |  |
|                           | ε           |                           |   |                                     |  |                         |                                    |  |
| 15                        | <b>E</b>    |                           |   |                                     |  |                         |                                    |  |
|                           | 8           |                           |   |                                     |  |                         |                                    |  |
| 16                        | €           |                           |   |                                     |  |                         |                                    |  |

Schedule J (Form 990) 2021

## SCHEDULE O (Form 990)

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or Form 990-EZ.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization

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

Open to Public Inspection Employer identification number

| Insight Center for Community Economic Development  | 94-2410277                              |
|--|---|
| Form 990, Part III, Line 4d, Other program services: Insight supported the preparation of a paper on soc   | sial determinants in health care.       |
| Form 990, Part VI, Line 11b, Review of Form 990: The Form 990 was prepared by the Insight Center's Viewith information supplied by auditors and outside accounting firm, reviewed by the President and sent          |   |
| Form 990, Part VI, Line 12c, Monitoring and enforcement: The officers and directors receive a copy of the once a year, and are expected to provide information on conflicts or potential conflicts. When a potential | ne conflict of interest policy at least |
| directors review the matter for approval or disapproval.   | ar connict is noted, disinterested      |
| Form 990, Part VI, Lines 15a-b, Compensation process: The Board approves the compensation of the Pr collected from reviewing the Form 990s of other organizations and published salary data when available           |   |
| evaluation of the President, and the Board's determinations are included in the minutes of its meetings. staff, including the Assistant Secretary, utilizing salary data when available.                             |   |
| Form 990, Part VI, Line 19, Making documents available: The Insight Center provides these documents or requester and by making them available for inspection at its principal office.                                | on request, by sending them to a        |
| Form 990, Part IX, Line 11g, Other fees for services: Payments made to consultants to carry out program grants and contracts. Our Asset Building program area paid approximately \$28,530 to consultants; our V      |   |
| paid approximately \$156,930 to consultants; our Economic Security program area paid approximately \$4 program area paid approximately \$78,750 to consultants, for a total of \$307,875 paid to consultants for p   | 3,665 to consultants; and our Health    |
|  |   |
|  |   |