Form **990** — **Return of Organization Exempt From Income Tax**

Under section 501(c) of the Internal Revenue Code (except black lung benefit trust or private foundation) or section 4947(a)(1) nonexempt charitable trust

Department of the Treasury Internal Revenue Service — Note *The organization may have to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-0047 — **1999** — This Form is Open to Public Inspection

A For the 1999 calendar year, OR tax year period beginning July 1, 1999, and ending June 30, 2000

B Check if: ☐ Change of address ☐ Initial return ☐ Final return ☐ Amended return (required also for state reporting)

Please use IRS label or print or type. See Specific Instructions.

C Name of organization: National Immigrant Legal Support Center

Number and street (or P O box if mail is not delivered to street address) / Room/suite: 3435 Wilshire Blvd , Suite 2850

City or town state or country and ZIP+4: Los Angeles, CA 90010

D Employer identification number: 95 - 4539765

E Telephone number: (213) 639-3900

F Check ▶ ☐ if exemption application is pending

G Type of organization—▶ [X] Exempt under section 501(c)(3) ◀ (insert number) OR ▶ ☐ section 4947(a)(1) nonexempt charitable trust

Note *Section 501(c)(3) exempt organizations and 4947(a)(1) nonexempt charitable trusts MUST attach a completed Schedule A (Form 990)*

H(a) Is this a group return filed for affiliates? ☐ Yes [X] No

H(b) If "Yes " enter the number of affiliates for which this return is filed ▶ ____

H(c) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes [X] No

I If either box in H is checked "Yes " enter four-digit group exemption number (GEN) ▶

J Accounting method ☐ Cash [X] Accrual ☐ Other (specify) ▶

K Check here ▶ ☐ if the organization s gross receipts are normally not more than $25 000 The organization need not file a return with the IRS but if it received a Form 990 Package in the mail it should file a return without financial data **Some states require a complete return.**

Note *Form 990-EZ may be used by organizations with gross receipts less than $100,000 and total assets less than $250,000 at end of year*

ENVELOPE POSTMARK DATE MAR 01 2002

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Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 15)

Revenue	1	Contributions, gifts, grants, and similar amounts received				
	a	Direct public support	1a	1,620,420		
	b	Indirect public support	1b			
	c	Government contributions (grants)	1c	72,027		
	d	Total (add lines 1a through 1c) (attach schedule of contributors) (cash $ 1,692,447 noncash $ 0)			1d	1,692,447
	2	Program service revenue including government fees and contracts (from Part VII, line 93)			2	92,134
	3	Membership dues and assessments			3	
	4	Interest on savings and temporary cash investments			4	88,467
	5	Dividends and interest from securities			5	
	6a	Gross rents	6a			
	b	Less rental expenses	6b			
	c	Net rental income or (loss) (subtract line 6b from line 6a)			6c	0
	7	Other investment income (describe ▶)			7	

		(A) Securities		(B) Other		
8a	Gross amount from sale of assets other than inventory		8a			
b	Less cost or other basis and sales expenses		8b			
c	Gain or (loss) (attach schedule)	0	8c	0		
d	Net gain or (loss) (combine line 8c, columns (A) and (B))				8d	0

9	Special events and activities (attach schedule)				
a	Gross revenue (not including $ ____ of contributions reported on line 1a)	9a			
b	Less direct expenses other than fundraising expenses	9b			
c	Net income or (loss) from special events (subtract line 9b from line 9a)			9c	0
10a	Gross sales of inventory, less returns and allowances	10a			
b	Less cost of goods sold	10b			
c	Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)			10c	0
11	Other revenue (from Part VII, line 103)			11	4,088
12	**Total revenue** (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)			12	1,877,136
13	Program services (from line 44, column (B))			13	1,457,080
14	Management and general (from line 44, column (C))			14	252,431
15	Fundraising (from line 44, column (D))			15	42,124
16	Payments to affiliates (attach schedule)			16	0
17	**Total expenses** (add lines 16 and 44, column (A))			17	1,751,635
18	Excess or (deficit) for the year (subtract line 17 from line 12)			18	125,501
19	Net assets or fund balances at beginning of year (from line 73, column (A))			19	1,643,353
20	Other changes in net assets or fund balances (attach explanation)			20	(14,891)
21	Net assets or fund balances at end of year (combine lines 18, 19, and 20)			21	1,753,963

(Lines 9–12: Revenue; lines 13–17: Expenses; lines 18–21: Net Assets)

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P NE D

Part II Statement of Functional Expenses All organizations must complete column (A) Columns (B), (C) and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others (See Specific Instructions on page 19)

	Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22	Grants and allocations (attach schedule) (cash $ ______ noncash $ ______)	22				
23	Specific assistance to individuals (attach schedule)	23				
24	Benefits paid to or for members (attach schedule)	24				
25	Compensation of officers, directors, etc	25	85,494	64,120	8,549	12,825
26	Other salaries and wages	26	827,589	712,000	110,152	5,437
27	Pension plan contributions	27	11,913	10,126	1,549	238
28	Other employee benefits	28	69,973	59,477	9,097	1,399
29	Payroll taxes	29	76,276	64,835	9,915	1,526
30	Professional fundraising fees	30				
31	Accounting fees	31	36,666		36,666	
32	Legal fees	32	325	325		
33	Supplies	33	37,582	32,320	4,510	752
34	Telephone	34	37,350	32,121	4,482	747
35	Postage and shipping	35	12,891	11,086	1,547	258
36	Occupancy	36	123,240	104,754	16,021	2,465
37	Equipment rental and maintenance	37				
38	Printing and publications	38				
39	Travel	39	19,764	17,788	1,976	
40	Conferences, conventions, and meetings	40				
41	Interest	41				
42	Depreciation, depletion, etc (attach schedule)	42	37,039	31,483	4,815	741
43	Other expenses (itemize) a	43a				
b	See Attached Schedule	43b	375,533	316,645	43,152	15,736
c		43c				
d		43d				
e		43e				
44	**Total functional expenses** (add lines 22 through 43) *Organizations completing columns (B)-(D), carry these totals to lines 13-15*	44	1,751,635	1,457,080	252,431	42,124

Reporting of Joint Costs Did you report in column (B) (Program services) any joint costs from a combined educational campaign and fundraising solicitation? ▶ ☐ Yes ☒ No

If "Yes," enter (i) the aggregate amount of these joint costs $______, (ii) the amount allocated to Program services $______, (iii) the amount allocated to Management and general $ ______, and (iv) the amount allocated to Fundraising $

Part III Statement of Program Service Accomplishments (See Specific Instructions on page 22)

What is the organization's primary exempt purpose? ▶ Provides Legal Support

All organizations must describe their exempt purpose achievements in a clear and concise manner State the number of clients served, publications issued, etc Discuss achievements that are not measurable (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others)

		Program Service Expenses (Required for 501(c)(3) and (4) orgs and 4947(a)(1) trusts but optional for others)
a	National Immigration Law Center provides legal support, advocacy, training, publications and technical assistance on behalf of low-income immigrants and their families. (Grants and allocations $)	1,457,080
b	(Grants and allocations $)	
c	(Grants and allocations $)	
d	(Grants and allocations $)	
e	Other program services (attach schedule) (Grants and allocations $)	
f	**Total of Program Service Expenses** (should equal line 44, column (B), Program services) ▶	1,457,080

Part IV **Balance Sheets** (See Specific Instructions on page 22)

Note	*Where required attached schedules and amounts within the description column should be for end-of-year amounts only*			(A) Beginning of year		(B) End of year
Assets	**45** Cash—non-interest-bearing				45	
	46 Savings and temporary cash investments			1,786,979	46	1,486,294
	47a Accounts receivable	47a	123,884			
	b Less allowance for doubtful accounts	47b	0	122	47c	123,884
	48a Pledges receivable	48a				
	b Less allowance for doubtful accounts	48b			48c	0
	49 Grants receivable			569,960	49	902,998
	50 Receivables from officers, directors, trustees, and key employees (attach schedule)				50	
	51a Other notes and loans receivable (attach schedule)	51a				
	b Less allowance for doubtful accounts	51b			51c	0
	52 Inventories for sale or use			17,400	52	
	53 Prepaid expenses and deferred charges			24,094	53	36,460
	54 Investments—securities (attach schedule)				54	
	55a Investments—land, buildings, and equipment basis	55a				
	b Less accumulated depreciation (attach schedule)	55b			55c	0
	56 Investments—other (attach schedule)				56	
	57a Land, buildings, and equipment basis	57a	219,271			
	b Less accumulated depreciation (attach schedule)	57b	118,774	132,612	57c	100,497
	58 Other assets (describe ▶ ______)			49,009	58	
	59 **Total assets** (add lines 45 through 58) (must equal line 74)			2,580,176	59	2,650,133
Liabilities	**60** Accounts payable and accrued expenses			151,429	60	125,002
	61 Grants payable			698,403	61	771,168
	62 Deferred revenue			53,530	62	
	63 Loans from officers, directors, trustees, and key employees (attach schedule)				63	
	64a Tax-exempt bond liabilities (attach schedule)				64a	
	b Mortgages and other notes payable (attach schedule)				64b	
	65 Other liabilities (describe ▶ ______)			33,461	65	
	66 **Total liabilities** (add lines 60 through 65)			936,823	66	896,170
Net Assets or Fund Balances	**Organizations that follow SFAS 117, check here ▶ ☒ and complete lines 67 through 69 and lines 73 and 74**					
	67 Unrestricted			1,643,353	67	1,168,158
	68 Temporarily restricted			0	68	585,805
	69 Permanently restricted			0	69	0
	Organizations that do not follow SFAS 117, check here ▶ ☐ and complete lines 70 through 74					
	70 Capital stock, trust principal, or current funds				70	
	71 Paid-in or capital surplus, or land, building, and equipment fund				71	
	72 Retained earnings, endowment, accumulated income, or other funds				72	
	73 **Total net assets or fund balances** (add lines 67 through 69 OR lines 70 through 72, column (A) must equal line 19 and column (B) must equal line 21)			1,643,353	73	1,753,963
	74 **Total liabilities and net assets / fund balances** (add lines 66 and 73)			2,580,176	74	2,650,133

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization How the public perceives an organization in such cases may be determined by the information presented on its return Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments

Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return (See Specific Instructions, page 24.)

a	Total revenue, gains, and other support per audited financial statements ▶	a	1,877,136
b	Amounts included on line a but not on line 12, Form 990		
	(1) Net unrealized gains on investments $		
	(2) Donated services and use of facilities $		
	(3) Recoveries of prior year grants $		
	(4) Other (specify) $		
	Add amounts on lines (1) through (4) ▶	b	0
c	Line a minus line b ▶	c	1,877,136
d	Amounts included on line 12, Form 990 but not on line a:		
	(1) Investment expenses not included on line 6b, Form 990 $		
	(2) Other (specify) $		
	Add amounts on lines (1) and (2) ▶	d	0
e	Total revenue per line 12, Form 990 (line c plus line d) ▶	e	1,877,136

Part IV-B Reconciliation of Expenses per Audited Financial Statements with Expenses per Return

a	Total expenses and losses per audited financial statements ▶	a	1,751,635
b	Amounts included on line a but not on line 17, Form 990		
	(1) Donated services and use of facilities $		
	(2) Prior year adjustments reported on line 20, Form 990 $		
	(3) Losses reported on line 20, Form 990 $		
	(4) Other (specify) $		
	Add amounts on lines (1) through (4) ▶	b	0
c	Line a minus line b ▶	c	1,751,635
d	Amounts included on line 17, Form 990 but not on line a.		
	(1) Investment expenses not included on line 6b, Form 990 $		
	(2) Other (specify) $		
	Add amounts on lines (1) and (2) ▶	d	0
e	Total expenses per line 17, Form 990 (line c plus line d) ▶	e	1,751,635

Part V List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated, see Specific Instructions on page 24.)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-.)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
Susan Drake 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Executive Director 35 hours/week	85,494	1,710	0
Charles Kamasaki 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Chair 1 hour/week	0	0	0
Iris Gomez 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Secretary 1 hour/week	0	0	0
Gary Rubin 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Treasurer 1 hour/week	0	0	0
Muzaffar Chishti 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Director 1 hour/week	0	0	0
Lucas Guttentag 3435 Wilshire Blvd., Ste. 2850, LA, CA 90010	Director 1 hour/week	0	0	0

75 Did any officer, director, trustee, or key employee receive aggregate compensation of more than $100,000 from your organization and all related organizations, of which more than $10,000 was provided by the related organizations? ▶ ☐ Yes ☒ No
If "Yes," attach schedule—see Specific Instructions on page 25.

Part VI Other Information (See Specific Instructions on page 25.)

		Line	Yes	No
76	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity	76		X
77	Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	77		X
78a	Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return?	78a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	78b	N/A	
79	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement	79		X
80a	Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?	80a		X
b	If "Yes," enter the name of the organization ▶ Not Applicable and check whether it is ☐ exempt **OR** ☐ nonexempt			
81a	Enter the amount of political expenditures, direct or indirect, as described in the instructions for line 81 — 81a: 0			
b	Did the organization file **Form 1120-POL** for this year?	81b		X
82a	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?	82a		X
b	If "Yes," you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions for reporting in Part III.) — 82b: N/A			
83a	Did the organization comply with the public inspection requirements for returns and exemption applications?	83a	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	83b	X	
84a	Did the organization solicit any contributions or gifts that were not tax deductible?	84a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	84b	N/A	
85	*501(c)(4), (5), or (6) organizations*.—a Were substantially all dues nondeductible by members?	85a	N/A	
b	Did the organization make only in-house lobbying expenditures of $2,000 or less?	85b	N/A	
	If "Yes" was answered to either 85a or 85b, **do not** complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.			
c	Dues, assessments, and similar amounts from members — 85c: N/A			
d	Section 162(e) lobbying and political expenditures — 85d: N/A			
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices — 85e: N/A			
f	Taxable amount of lobbying and political expenditures (line 85d less 85e) — 85f: N/A			
g	Does the organization elect to pay the section 6033(e) tax on the amount in 85f?	85g	N/A	
h	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount in 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?	85h	N/A	
86	*501(c)(7) orgs*. Enter: a Initiation fees and capital contributions included on line 12 — 86a: N/A			
b	Gross receipts, included on line 12, for public use of club facilities — 86b: N/A			
87	*501(c)(12) orgs*. Enter: **a** Gross income from members or shareholders — 87a: N/A			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) — 87b: N/A			
88	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Part IX	88		X
89a	*501(c)(3) organizations*. Enter: Amount of tax imposed on the organization during the year under section 4911 ▶ 0, section 4912 ▶ 0, section 4955 ▶ 0			
b	*501(c)(3) and 501(c)(4) orgs*. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of any excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction	89b		X
c	Enter: Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ 0			
d	Enter: Amount of tax on line 89c, above, reimbursed by the organization ▶ 0			

90a List the states with which a copy of this return is filed ▶ California

b Number of employees employed in the pay period that includes March 12, 1999 (See inst.) 90b: 25

91 The books are in care of ▶ Monica Dunahee Telephone no. ▶ (213) 639-3900
Located at ▶ 3435 Wilshire Blvd., Suite 2850, Los Angeles, CA ZIP + 4 ▶ 90010

92 *Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of* **Form 1041**—Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 92: N/A

Part VII Analysis of Income-Producing Activities (See Specific Instructions on page 29.)

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue					
a Training					61,790
b Publications					21,987
c Attorney Fees					8,357
d					
e					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	88,467	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					
103 Other revenue a Royalties			01	4,088	
b					
c					
d					
e					
104 Subtotal (add columns (B), (D), and (E))		0		92,555	92,134

105 Total (add line 104, columns (B), (D), and (E)) ▶ 184,689

Note. *(Line 105 plus line 1d, Part I, should equal the amount on line 12, Part I.)*

Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes (See Specific Instructions on page 30.)

Line No. ▼	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes).
93a	Technical Assistance
93b	Educational Publications
93c	Legal Representations
	All of the above activities furthers the center's exempt purpose of providing legal support, advocacy,
	training, publications and technical assistance on behalf of low-income immigrants and their families.

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See Specific Instructions on page 30.)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
	%			
	%			
	%			
	%			

Please Sign Here

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. (Important. See General Instruction U, on page 14.)

▶ Susan Drake   12/28/02   ▶ SUSAN DRAKE, EXECUTIVE DIRECTOR

Signature of officer   Date   Type or print name and title

Paid Preparer's Use Only

Preparer's signature ▶	Date 2/22/02	Check if self-employed ▶ ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed) and address ▶	Harrington Whittemore, CPA's, LLP	EIN ▶ 95 - 4557617	
	201 South Lake Avenue, Suite 708, Pasadena	ZIP + 4 ▶ 91101	

SCHEDULE A (Form 990)

Department of the Treasury Internal Revenue Service

Organization Exempt Under Section 501(c)(3)

(Except Private Foundation) and Section 501(e), 501(f), 501(k), 501(n), or Section 4947(a)(1) Nonexempt Charitable Trust

Supplementary Information—(See separate instructions.)

▶ MUST be completed by the above organizations and attached to their Form 990 or 990-EZ

OMB No 1545 0047

1999

Name of the organization: National Immigrant Legal Support Center

Employer identification number: 95 | 4539765

Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees

(See page 1 of the instructions List each one If there are none, enter "None ")

(a) Name and address of each employee paid more than $50 000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
Linton Joaquin 3435 Wilshire Bl , Ste 2850, LA, CA 90010	Litigation Director 35 hours/week	70,261	1,405	0
Joshua Bernstein 3435 Wilshire Bl , Ste.2850, LA, CA 90010	Policy Analyst 35 hours/week	65,281	1,306	0
Braden Cancilla 3435 Wilshire Bl , Ste 2850, LA, CA 90010	Attorney 35 hours/week	64,355	571	0
Tanya Broder 3435 Wilshire Bl , Ste 2850, LA, CA 90010	Policy Analyst 35 hours/week	62,211	1,244	0
Dinah Wiley 3435 Wilshire Bl , Ste 2850, LA, CA 90010	Policy Analyst 35 hours/week	61,291	1,151	0
Total number of other employees paid over $50,000 ▶	2			

Part II Compensation of the Five Highest Paid Independent Contractors for Professional Services

(See page 1 of the instructions List each one (whether individuals or firms) If there are none, enter "None ")

(a) Name and address of each independent contractor paid more than $50 000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over $50,000 for professional services ▶ 0		

Part III Statements About Activities

			Yes	No
1	During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities ▶ $ 118,079. Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A Other organizations checking "Yes," must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities	1	X	
2	During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any of its trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary			
a	Sale, exchange, or leasing of property?	2a		X
b	Lending of money or other extension of credit?	2b		X
c	Furnishing of goods, services, or facilities?	2c		X
d	Payment of compensation (or payment or reimbursement of expenses if more than $1,000)?	2d	X	
e	Transfer of any part of its income or assets? If the answer to any question is "Yes," attach a detailed statement explaining the transactions	2e		X
3	Does the organization make grants for scholarships, fellowships, student loans, etc ?	3		X
4a	Do you have a section 403(b) annuity plan for your employees?	4a	X	
b	Attach a statement to explain how the organization determines that individuals or organizations receiving grants or loans from it in furtherance of its charitable programs qualify to receive payments (See page 2 of the instructions)			

Part IV Reason for Non-Private Foundation Status (See pages 2 through 4 of the instructions)

The organization is not a private foundation because it is (Please check only **ONE** applicable box)

5 ☐ A church, convention of churches, or association of churches Section 170(b)(1)(A)(i)

6 ☐ A school Section 170(b)(1)(A)(ii) (Also complete Part V, page 4)

7 ☐ A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)

8 ☐ A Federal, state, or local government or governmental unit Section 170(b)(1)(A)(v)

9 ☐ *A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii)* **Enter the hospital's name, city, and state** ▶

10 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the **Support Schedule** in Part IV-A)

11a ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A)

11b ☐ A community trust Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A)

12 ☐ An organization that normally receives **(1) more than 33⅓%** of its support from contributions, membership fees, and gross receipts from activities related to its charitable, etc , functions—subject to certain exceptions, and **(2) no more than 33⅓%** of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See section 509(a)(2) (Also complete the **Support Schedule** in Part IV-A)

13 ☐ An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in **(1)** lines 5 through 12 above, or **(2)** section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2) (See section 509(a)(3))

Provide the following information about the supported organizations (See page 4 of the instructions)

(a) Name(s) of supported organization(s)	**(b)** Line number from above
Not Applicable	

14 ☐ An organization organized and operated to test for public safety Section 509(a)(4) (See page 4 of the instructions)

Part IV-A **Support Schedule** (Complete only if you checked a box on line 10, 11, or 12) *Use cash method of accounting*
Note *You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting*

Calendar year (or fiscal year beginning in) ▶	(a) 1998	(b) 1997	(c) 1996	(d) 1995	(e) Total
15 Gifts, grants, and contributions received (Do not include unusual grants See line 28)	2,616,297	2,415,282	944,142	1,266,881	7,242,602
16 Membership fees received					0
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is not a business unrelated to the organization's charitable, etc , purpose	54,491	95,200	118,621	265,153	533,465
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	72,046	61,951	42,406	23,504	199,907
19 Net income from unrelated business activities not included in line 18					0
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					0
21 The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge					0
22 Other income Attach a schedule Do not include gain or (loss) from sale of capital assets	2,122				2,122
23 Total of lines 15 through 22	2,744,956	2,572,433	1,105,169	1,555,538	7,978,096
24 Line 23 minus line 17	2,690,465	2,477,233	986,548	1,290,385	7,444,631
25 Enter 1% of line 23	27,450	25,724	11,052	15,555	

26 **Organizations described on lines 10 or 11.** a Enter 2% of amount in column (e), line 24 ▶	26a	148,893
b Attach a list (which is not open to public inspection) showing the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1995 through 1998 exceeded the amount shown in line 26a Enter the sum of all these excess amounts ▶	26b	4,881,791
c Total support for section 509(a)(1) test Enter line 24, column (e) ▶	26c	7,444,631
d Add Amounts from column (e) for lines 18 199,907 19 0 22 2,122 26b 4,881,791 ▶	26d	5,083,820
e Public support (line 26c minus line 26d total) ▶	26e	2,360,811
f **Public support percentage (line 26e (numerator) divided by line 26c (denominator))** ▶	26f	31 71 %

27 **Organizations described on line 12** a For amounts included in lines 15, 16, and 17 that were received from a "disqualified person," attach a list to show the name of, and total amounts received in each year from, each "disqualified person " Enter the sum of such amounts for each year

(1998) N/A (1997) N/A (1996) N/A (1995) N/A

b For any amount included in line 17 that was received from a nondisqualified person, attach a list to show the name of and amount received for each year, that was more than the **larger** of **(1)** the amount on line 25 for the year or **(2)** $5,000 (Include in the list organizations described in lines 5 through 11, as well as individuals) After computing the difference between the amount received and the larger amount described in **(1)** or **(2)**, enter the sum of these differences (the excess amounts) for each year

(1998) N/A (1997) N/A (1996) N/A (1995) N/A

c Add Amounts from column (e) for lines 15 ____ 16 ____ 17 ____ 20 ____ 21 ____ ▶	27c	
d Add Line 27a total ____ and line 27b total ____ ▶	27d	
e Public support (line 27c total minus line 27d total) ▶	27e	
f Total support for section 509(a)(2) test Enter amount on line 23, column (e) ▶ 27f		
g **Public support percentage (line 27e (numerator) divided by line 27f (denominator))** ▶	27g	%
h **Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))** ▶	27h	%

28 **Unusual Grants** For an organization described in line 10, 11, or 12 that received any unusual grants during 1995 through 1998, attach a list (which is not open to public inspection) for each year showing the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant Do not include these grants in line 15 (See page 4 of the instructions)

Part V Private School Questionnaire (See page 4 of the instructions.)
(To be completed ONLY by schools that checked the box on line 6 in Part IV)

			Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	29	N/A	
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	30	N/A	
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves?	31	N/A	
	If "Yes," please describe, if "No," please explain. (If you need more space, attach a separate statement.) Not Applicable			
32	Does the organization maintain the following:			
a	Records indicating the racial composition of the student body, faculty, and administrative staff?	32a	N/A	
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	32b	N/A	
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	32c	N/A	
d	Copies of all material used by the organization or on its behalf to solicit contributions?	32d	N/A	
	If you answered "No" to any of the above, please explain. (If you need more space, attach a separate statement.) Not Applicable			
33	Does the organization discriminate by race in any way with respect to:			
a	Students' rights or privileges?	33a	N/A	
b	Admissions policies?	33b	N/A	
c	Employment of faculty or administrative staff?	33c	N/A	
d	Scholarships or other financial assistance?	33d	N/A	
e	Educational policies?	33e	N/A	
f	Use of facilities?	33f	N/A	
g	Athletic programs?	33g	N/A	
h	Other extracurricular activities?	33h	N/A	
	If you answered "Yes" to any of the above, please explain. (If you need more space, attach a separate statement.) Not Applicable			
34a	Does the organization receive any financial aid or assistance from a governmental agency?	34a	N/A	
b	Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b, please explain using an attached statement.	34b	N/A	
35	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," attach an explanation	35	N/A	

Part VI-A **Lobbying Expenditures by Electing Public Charities** (See page 6 of the instructions.)
(To be completed **ONLY** by an eligible organization that filed Form 5768)

Check here ▶ **a** ☐ if the organization belongs to an affiliated group

Check here ▶ **b** ☐ if you checked "a" above and "limited control" provisions apply

	Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
36	Total lobbying expenditures to influence public opinion (grassroots lobbying)	36		22,079
37	Total lobbying expenditures to influence a legislative body (direct lobbying)	37		96,000
38	Total lobbying expenditures (add lines 36 and 37)	38		118,079
39	Other exempt purpose expenditures	39		1,633,556
40	Total exempt purpose expenditures (add lines 38 and 39)	40		1,751,635
41	Lobbying nontaxable amount. Enter the amount from the following table—	41	0	237,582
42	Grassroots nontaxable amount (enter 25% of line 41)	42		59,396
43	Subtract line 42 from line 36. Enter -0- if line 42 is more than line 36	43		0
44	Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38	44		0

If the amount on line 40 is—	**The lobbying nontaxable amount is—**
Not over $500,000	20% of the amount on line 40
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000
Over $17,000,000	$1,000,000

Caution: *If there is an amount on either line 43 or line 44, you must file Form 4720.*

4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 45 through 50 on page 7 of the instructions.)

		Lobbying Expenditures During 4-Year Averaging Period				
	Calendar year (or fiscal year beginning in) ▶	(a) 1999	(b) 1998	(c) 1997	(d) 1996	(e) Total
45	Lobbying nontaxable amount	237,582	228,006	228,061	173,680	867,329
46	Lobbying ceiling amount (150% of line 45(e))					1,300,994
47	Total lobbying expenditures	118,079	47,673	33,072	39,648	238,472
48	Grassroots nontaxable amount	59,396	57,002	57,015	43,420	216,833
49	Grassroots ceiling amount (150% of line 48(e))					325,250
50	Grassroots lobbying expenditures	22,079	5,158	3,086	1,586	31,909

Part VI-B **Lobbying Activity by Nonelecting Public Charities**
(For reporting only by organizations that did not complete Part VI-A) (See page 8 of the instructions.)

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:	Yes	No	Amount
a Volunteers	N	A	
b Paid staff or management (Include compensation in expenses reported on lines **c** through **h**.)	N	A	
c Media advertisements	N	A	
d Mailings to members, legislators, or the public	N	A	
e Publications, or published or broadcast statements	N	A	
f Grants to other organizations for lobbying purposes	N	A	
g Direct contact with legislators, their staffs, government officials, or a legislative body	N	A	
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means	N	A	
i Total lobbying expenditures (add lines **c** through **h**)			0

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities.

Part VII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations** (See page 8 of the instructions)

51 Did the reporting organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

			Yes	No
a	Transfers from the reporting organization to a noncharitable exempt organization of			
	(i) Cash	51a(i)		X
	(ii) Other assets	a(ii)		X
b	Other transactions			
	(i) Sales or exchanges of assets with a noncharitable exempt organization	b(i)		X
	(ii) Purchases of assets from a noncharitable exempt organization	b(ii)		X
	(iii) Rental of facilities, equipment, or other assets	b(iii)		X
	(iv) Reimbursement arrangements	b(iv)		X
	(v) Loans or loan guarantees	b(v)		X
	(vi) Performance of services or membership or fundraising solicitations	b(vi)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization If the organization received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions and sharing arrangements
		Not Applicable	

52a Is the organization directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ▶ ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
Not Applicable		