Form **990-PF**
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No. 1545-0052

2020

Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020 , and ending 12-31-2020

Name of foundation
CHICAGO BEYOND INC

% FRANKLIN MONROE ADMINISTRATI

A Employer identification number
47-5610834

Number and street (or P.O. box number if mail is not delivered to street address)
227 W MONROE ST SUITE 5000
Room/suite

B Telephone number (see instructions)
(312) 244-6980

City or town, state or province, country, and ZIP or foreign postal code
CHICAGO, IL 60606

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here............ ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 1,083,634

J Accounting method: ☐ Cash ☑ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	120			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities				
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10				
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	120	0		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	337,500			
	14	Other employee salaries and wages	1,474,084			
	15	Pension plans, employee benefits	160,628			
	16a	Legal fees (attach schedule)	2,793	0	0	0
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	250,250			
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	120,460			
	19	Depreciation (attach schedule) and depletion	70,509			
	20	Occupancy	13,618			
	21	Travel, conferences, and meetings	47,659			
	22	Printing and publications	47,976			
	23	Other expenses (attach schedule)	760,392			
	24	**Total operating and administrative expenses.** Add lines 13 through 23	3,285,869	0	0	0
	25	Contributions, gifts, grants paid	5,294,188			5,294,188
	26	**Total expenses and disbursements.** Add lines 24 and 25	8,580,057	0	0	5,294,188
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-8,579,937			
	b	**Net investment income** (if negative, enter -0-)		0		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

			Beginning of year	End of year	
			(a) Book Value	**(b)** Book Value	**(c)** Fair Market Value
Assets	1	Cash—non-interest-bearing	980,991	203,219	203,218
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶ 637,786			
		Less: accumulated depreciation (attach schedule) ▶ 107,305	584,126	530,481	530,416
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	350,000	350,000	350,000
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,915,117	1,083,700	1,083,634
Liabilities	17	Accounts payable and accrued expenses	61,517	35,037	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	40,102,489	47,877,489	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities**(add lines 17 through 22)	40,164,006	47,912,526	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here** ▶ ☐ **and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ▶ ☑ **and complete lines 26 through 30.**			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	-38,248,889	-46,828,826	
	29	**Total net assets or fund balances** (see instructions)	-38,248,889	-46,828,826	
	30	**Total liabilities and net assets/fund balances** (see instructions)	1,915,117	1,083,700	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	-38,248,889
2	Enter amount from Part I, line 27a	2	-8,579,937
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	-46,828,826
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	-46,828,826

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } **2**

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 . . . . **3**

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved

(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved

2 Reserved **2**

3 Reserved. **3**

4 Reserved **4**

5 Reserved **5**

6 Reserved **6**

7 Reserved **7**

8 Reserved , ... **8**

Part VI **Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ **(attach copy of letter if necessary–see instructions)**		
b	Reserved	1	0
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	0
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	0
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	0
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2021 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?.	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DE, IL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶CHICAGOBEYOND.ORG

14 The books are in care of ▶FRANKLIN MONROE ADMINISTRATIVE Telephone no. ▶(312) 244-6980

Located at ▶227 W MONROE ST SUITE 5000 CHICAGO IL ZIP+4 ▶60606

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Yes No

1a During the year did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☑ Yes ☐ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No

			Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?	1c		No

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☑ No

If "Yes," list the years ▶ 20___ , 20___ , 20___ , 20___

			Yes	No
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		No

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
▶ 20___ , 20___ , 20___ , 20___

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No

			Yes	No
b	If "Yes," did it have excess business holdings in 2020 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year? ☐ Yes ☑ No			

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(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 and deferred compensation	**(e)** Expense account, other allowances
Elizabeth Dozier 227 W MONROE ST SUITE 5000 CHICAGO, IL 60606	MANAGING DIRECTOR & PRESIDENT 40.0	337,500	29,512	0
Mark R Walter 227 W MONROE ST SUITE 5000 CHICAGO, IL 60606	Director 1.0	0	0	0
Kimbra D Walter 227 W MONROE ST SUITE 5000 CHICAGO, IL 60606	Director 1.0	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If 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 and deferred compensation	**(e)** Expense account, other allowances

Total number of other employees paid over $50,000 ▶ 6

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
Human Impact Solutions 227 W Monroe St Suite 5000 CHICAGO,IL 60606	Consulting	75,290

Total number of others receiving over $50,000 for professional services. . . . . ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	0
b	Average of monthly cash balances	1b	471,224
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	471,224
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	471,224
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	7,068
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	464,156
6	**Minimum investment return.** Enter 5% of line 5	6	23,208

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	23,208
2a	Tax on investment income for 2020 from Part VI, line 5	2a	0		
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	23,208
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	23,208
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	23,208

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	5,294,188
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,294,188
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	5,294,188

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7					23,208
2 Undistributed income, if any, as of the end of 2020:					
a Enter amount for 2019 only.				0	
b Total for prior years: 2018 , 2017 , 2016			0		
3 Excess distributions carryover, if any, to 2020:					
a From 2015.	89,840				
b From 2016.	4,094,886				
c From 2017.	10,856,243				
d From 2018.	8,936,468				
e From 2019.	5,916,321				
f **Total** of lines 3a through e.		29,893,758			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ $ 5,294,188					
a Applied to 2019, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2020 distributable amount					23,208
e Remaining amount distributed out of corpus		5,270,980			
5 Excess distributions carryover applied to 2020. *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6 **Enter the net total of each column as indicated below:**					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		35,164,738			
b Prior years' undistributed income. Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d Subtract line 6c from line 6b. Taxable amount —see instructions			0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions				0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)					
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions) . . .		89,840			
9 **Excess distributions carryover to 2021.** Subtract lines 7 and 8 from line 6a		35,074,898			
10 Analysis of line 9:					
a Excess from 2016	4,094,886				
b Excess from 2017	10,856,243				
c Excess from 2018. . . .	8,936,468				
d Excess from 2019	5,916,321				
e Excess from 2020	5,270,980				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling

b. Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2020	**(b)** 2019	**(c)** 2018	**(d)** 2017	**(e) Total**
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: **a** "Assets" alternative test—enter: **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . .					
c "Support" alternative test—enter: **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
University of Chicago - Urban Labs 6030 S Ellis Ave Chicago,IL 60637			Urban labs	465,532
Youth Advocate Programs 1111 E 87th Street Suite 200 Chicago,IL 60619			Provide young Chicagoans with neighborhood-based mentor-advocates	1,593,750
Lawndale Christian Legal Center 1530 S Hamlin Ave Chicago,IL 60623			Provide community-based holistic legal and social services to minors and emerging adults at every step of the juvenile and adult criminal justice system	763,406
Sweet Water Foundation 5749 South Perry Avenue Chicago,IL 60621			To support the formalization of Sweet Water Academy, a neighborhood development demonstration site and living learning laboratory.	175,000
Chicago Art Department 1926 South Halsted Street Chicago,IL 60608			To support Chicago artists	10,000
Gray Matter Experience 1011 W 19th St Chicago,IL 60608			To help high school students of color learn about entrepreneurship and launch enterprises.	10,000
MHA Labs 332 South Michigan 9th Fl Chicago,IL 60604			To support investments in academic excellence, technical expertise, and college/career navigation to increase the number of youth achieving college, career, and life success.	10,000
Institute for Non-Violence 819 N Leamington St Chicago,IL 60651			To help replace the cycle of violence using the principles, practices and teachings of nonviolence.	83,226
Healthy Hood Chicago 2242 S Damen Chicago,IL 60608			To help educate and train students and residents in South and West Side neighborhoods about healthy eating, exercise, and preventative care.	10,000
Resilience Partners NFP 4455 South King Drive Suite 101 Chicago,IL 60653			to help individuals and organizations in underserved and marginalized communities develop their technology, fiduciary responsibilities and business practices.	35,000
Teamwork Englewood 815 W 63rd Street Suite 2 Chicago,IL 60621			To improve the quality of life of the residents and stakeholders of Englewood by facilitating economic, educational and social opportunities.	25,704
Youth Peace Center 420 West 111th Street Chicago,IL 60628			To provide programs that mentor teens and teach youth the skills necessary to avoid conflict and violence.	25,000
Pilsen Neighbors 2026 S Blue Island Ave Chicago,IL 60608			To support social justice, education reform, healthcare, immigration reform and civic engagement in Pilsen.	20,000
Center on Halsted 3656 N Halsted St Chicago,IL 60613			To support the health and well-being of the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ) people of Chicagoland.	10,000
Roseland GoodNews 210 W 113th St Chicago,IL 60628			To provide child-care for high school, college and low-income working moms in a safe, nurturing Christ-centered environment, allowing young mothers to go to school, work full-time essential jobs, and provide for their children.	15,000
Southwest Organizing Project 2558 W 63rd St Chicago,IL 60629			To support communities in Southwest Chicago	5,000

Firehouse Community Arts Center 2111 S Hamlin Ave Chicago,IL 60629			To support art programs dedicated to preventing and interrupting youth and young adults caught in violence.	10,495
Jehovah Jireh Outreach 114 N Lorel Ave Chicago,IL 60644			To provide outreach, meditation, general community support, and hyperlocal violence interruption efforts in the Austin community.	20,000
Telpochcalli Community 2832 W 24th Blvd Chicago,IL 60623			To support mobilizing youth and adults for social justice work by building individual capacity, collective power, and mutual responsibility through culturally relevant and community-directed education, leadership development, and organizing.	20,000
Girls Like Me Project 7116 S Morgan St Chicago,IL 60621			To provide virtual programming for the girls, resources for the community, and continue the work of the Girls Like Me Project.	5,000
Black United Fund 1809 East 71st St Chicago,IL 60649			To support the improvement the quality of life for African Americans through reliance on self-help at the local community level.	25,000
Travelers and Immigrants Aids 208 S LaSalle St Suite 1300 Chicago,IL 60604			To provide resources and referrals, crisis intervention and protective travel services to passengers traveling through Chicago's O'Hare International Airport.	14,000
The Chicago Community Foundation 225 N Michigan Ave Suite 2200 Chicago,IL 60601			To support the work of community members and change-makers committed to strengthening the Chicago region.	25,000
Fathers Who Care 4540 West Washington Blvd Chicago,IL 60624			To advocate on behalf of fathers in the areas of Responsible Fatherhood Involvement, Healthy relationships, Father's Rights, Re-entry Opportunities, Men's Health and Wellness and Youth Leadership and Development.	5,000
Kids off the Block 11623 S Michigan Ave Chicago,IL 60628			To provide at-risk low income youth positive alternatives to gangs, drugs, truancy, violence and the juvenile justice system.	3,763
True Star Foundation 1130 South Wabash Chicago,IL 60605			To support after-school, in-school and summer programming in which students are educated about a variety of disciplines in the media industry.	3,000
Hektoen Institute for Medical Research 1339 S Wood Street Suite G Chicago,IL 60608			Medical research	70,000
Storycatchers Theatre 544 W Oak St 1005 Chicago,IL 60610			To help court-involved youth with a post-release employment program	1,941
The Night Ministry 1735 North Ashland Avenue Suite 20 Chicago,IL 60622			To provide housing, health care, outreach, spiritual care, and social services to adults and youth who struggle with homelessness, poverty, and loneliness.	1,398
Lucy Parsons Lab 332 S Michigan Ave Suite 1032 L53 Chicago,IL 60604			Digital rights & police accountability	1,142
IL Dept of Juvenile Justice 1112 S Wabash Ave 2nd Floor Chicago,IL 60605			Building youth skills and strengthening families	1,595
Latinos Progresando 3047 W Cermak Rd Chicago,IL 60623			To deliver high quality information and resources for people to build secure, healthy and productive lives.	973
Cook County Dept of Corrections 2700 S Carolina Ave Chicago,IL 60608			Covid-19 Relief	4,544
One Northside 4684 N Racine Chicago,IL 60640			Organizing neighborhoods for equality	1,654
Inner City Muslim Action Network			Covid-19 relief. To foster	758,063

2744 W 63rd St Chicago,IL 60629			health, wellness, and healing in the inner-city by organizing for social change, cultivating the arts, and operating a holistic health center.	
Chicago Cred 300 E Randolph St Suite 4030 Chicago,IL 60623			Covid-19 Relief. Reduction of gun violence in chicago	1,064,499
IL Dept of Corrections James R Thompson Center 100 W Randolph Chicago,IL 60601			Covid-19 Relief	503
Total . . . . ▶ **3a**				5,294,188
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
1 Program service revenue:	**(a)** Business code	**(b)** Amount	**(c)** Exclusion code	**(d)** Amount	
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: **a**					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .					

13 **Total.** Add line 12, columns (b), (d), and (e). . . . . **13** ____________
(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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 foundation. If the foundation 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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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

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 taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee	Date: 2021-06-23	Title

May the IRS discuss this return with the preparer shown below (see instr.) ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
Firm's name ▶				Firm's EIN ▶
Firm's address ▶				Phone no.

Additional Data

Return to Form

Software ID:
Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

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TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Description of Amortized Expenses	Date Acquired, Completed, or Expended	Amount Amortized	Deduction for Prior Years	Amortization Method	Current Year Amortization	Net Investment Income	Adjusted Net Income	Total Amount of Amortization
LHI	2019-10-01	496,157	12,101	10.25	48,406			60,507
LHI 7/30/20	2020-07-31	2,504		9.5	110			110

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Contractor	Explanation
Human Impact Solutions	CONSULTING

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TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTERS 2016	2017-01-01	8,226	4,935	SL	5	1,645			
COMPUTERS 1/15/17	2017-01-15	3,098	1,860	SL	5	620			
COMPUTERS 6/15/17	2017-06-15	4,248	2,196	SL	5	850			
COMPUTERS 9/21/17	2017-09-21	6,043	2,720	SL	5	1,209			
COMPUTERS 11/15/17	2017-11-15	5,202	2,253	SL	5	1,040			
COMPUTERS 4/6/18	2018-04-06	4,726	1,654	SL	5	945			
COMPUTERS 5/15/18	2018-05-15	9,283	3,095	SL	5	1,857			
COMPUTERS 6/15/18	2018-06-15	4,811	1,523	SL	5	962			
COMPUTERS 9/13/18	2018-09-13	1,537	409	SL	5	307			
FURNITURE 6/15/19	2019-06-15	4,293	358	SL	7	613			
FURNITURE 7/15/19	2019-07-15	27,702	1,979	SL	7	3,957			
COMPUTERS 8/15/19	2019-08-15	7,486	624	SL	5	1,497			
FURNITURE 8/15/19	2019-08-15	1,494	89	SL	7	213			
FURNITURE 9/6/19	2019-09-06	3,205	153	SL	7	458			
FURNITURE 10/15/19	2019-10-15	4,228	151	SL	7	604			
FURNITURE 11/15/19	2019-11-15	29,182	695	SL	7	4,169			
FURNITURE 1/17/20	2020-01-17	1,254		SL	7	164			
FURNITURE 3/10/20	2020-03-10	5,875		SL	7	699			
COMPUTERS 11/9/20	2020-11-09	5,505		SL	5	184			
COMPUTERS 12/31/20	2020-12-31	1,728		SL	5				

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Name: CHICAGO BEYOND INC

EIN: 47-5610834

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	2,793			

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Item No.	1
Lender's Name	MARK R WALTER DIRECTOR
Lender's Title	
Original Amount of Loan	160000
Balance Due	41877489
Date of Note	2015-11
Maturity Date	
Repayment Terms	DEMAND NOTE
Interest Rate	
Security Provided by Borrower	
Purpose of Loan	CHARITABLE EXPENSES
Description of Lender Consideration	
Consideration FMV	

Item No.	2
Lender's Name	DLHPII GOOD WORKS
Lender's Title	
Original Amount of Loan	4000000
Balance Due	6000000
Date of Note	2019-05
Maturity Date	
Repayment Terms	DEMAND NOTE
Interest Rate	
Security Provided by Borrower	
Purpose of Loan	CHARITABLE EXPENSES
Description of Lender Consideration	
Consideration FMV	

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSIT	350,000	350,000	350,000

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REGISTRATION FEES	174			
BANK FEES	1,577			
INSURANCE	26,249			
PAYROLL FEES	11,854			
MISCELLANEOUS	7,602			
RENT, PARKING, UTILITIES	585,179			
COVID-19 RESPONSE EXPENSES	127,757			

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL DEVELOPMENT	55,650			
COMMUNITY GATHERING & MKTING	28,047			
COMMUNICATIONS SUPPORT SERVICE	459			
CONSULTING	152,869			
CONTRACT SERVICES	11,610			
WEBSITE DEVELOPMENT & MAINTENA	1,615			

TY 2020 IRS 990 e-File Render

Name: CHICAGO BEYOND INC

EIN: 47-5610834

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	120,460			