

990

Return of Organization Exempt From Income Tax

OMB No. 1545-

0047 2021

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundation): Do not enter social security numbers on this form as it may be made public.

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

Form 990 Department of the Treasury Internal Revenue Service

A For the 2021 calendar year, or tax year beginning 07-01-2021, and ending 06-30-2022

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

C Name of organization: JEFFERSON REGIONAL FOUNDATION. Doing business as. Number and street (or P.O. box if mail is not delivered to street address) Room/suite: 470 STREETS RUN ROAD 301. City or town, state or province, country, and ZIP or foreign postal code: PITTSBURGH, PA 15236

D Employer identification number: 56-2420913. E Telephone number: (412) 267-6771

G Gross receipts \$ 26,559,209

F Name and address of principal officer: CHARLES R MODISPACHER, 470 STREETS RUN ROAD 301, PITTSBURGH, PA 15236

H(a) Is this a group return for subordinates? Yes No. H(b) Are all subordinates included? Yes No. If "No," attach a list. See instructions.

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

J Website: WWW.JEFFERSONRF.ORG

H(c) Group exemption number

K Form of organization: Corporation Trust Association Other

L Year of formation: 2003 M State of legal domicile: PA

Part I Summary

1 Briefly describe the organization's mission or most significant activities: IMPROVE THE HEALTH & WELL-BEING OF THE COMMUNITY OF JEFFERSON HOSPITAL THROUGH GRANTMAKING, EDUCATION & OUTREACH.

Table with 2 columns: Description, Amount. Rows 2-7b: 2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets. 3 Number of voting members of the governing body (Part VI, line 1a) 3 19. 4 Number of independent voting members of the governing body (Part VI, line 1b) 4 18. 5 Total number of individuals employed in calendar year 2021 (Part V, line 2a) 5 8. 6 Total number of volunteers (estimate if necessary) 6 18. 7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0. 7b Net unrelated business taxable income from Form 990-T, Part I, line 11 7b 0.

Table with 3 columns: Description, Prior Year, Current Year. Rows 8-12: 8 Contributions and grants (Part VIII, line 1h) 0 0. 9 Program service revenue (Part VIII, line 2g) 0 0. 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 8,243,983 8,684,501. 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 0 0. 12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) 8,243,983 8,684,501.

Table with 3 columns: Description, Prior Year, Current Year. Rows 13-19: 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 2,977,350 2,735,250. 14 Benefits paid to or for members (Part IX, column (A), line 4) 0 0. 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 572,012 593,346. 16a Professional fundraising fees (Part IX, column (A), line 11e) 0 0. 16b Total fundraising expenses (Part IX, column (D), line 25) 0 0. 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) 583,741 641,743. 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 4,133,103 3,970,339. 19 Revenue less expenses. Subtract line 18 from line 12 4,110,880 4,714,162.

Table with 3 columns: Description, Beginning of Current Year, End of Year. Rows 20-22: 20 Total assets (Part X, line 16) 125,500,456 105,621,222. 21 Total liabilities (Part X, line 26) 1,236,314 884,715. 22 Net assets or fund balances. Subtract line 21 from line 20 124,264,142 104,736,507.

Part II Signature Block

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

Sign Here Signature of officer: GARY EVANS VICE CHAIR OF THE BOARD. Date: 2023-03-28. Type or print name and title.

Paid Preparer Use Only Print/Type preparer's name: BAKER TILLY US LLP. Preparer's signature. Date: 2023-03-28. Check if self-employed. PTIN: P00959793. Firm's EIN: 39-0859910. Firm's address: 205 N MICHIGAN AVE 2800 CHICAGO, IL 606015927. Phone no. (312) 729-8000.

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

THE MISSION OF THE JEFFERSON REGIONAL FOUNDATION IS TO IMPROVE THE HEALTH AND WELL-BEING OF THE COMMUNITY OF JEFFERSON HOSPITAL THROUGH GRANTMAKING, EDUCATION AND OUTREACH. CONTINUED ON SCHEDULE O.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 1,492,000 including grants of \$ 1,492,000 ) (Revenue \$ 0 )

THE JEFFERSON REGIONAL FOUNDATION AWARDS GRANTS TO PROMOTE THE OVERALL HEALTH AND VITALITY OF THE COMMUNITY UTILIZING THE SOCIAL DETERMINANTS OF HEALTH AS A LENS FOR RESPONDING TO COMMUNITY NEEDS. THIRTY-FOUR GRANTS WERE AWARDED WITHIN THE FISCAL YEAR. THE FOUNDATION HAS IDENTIFIED SIX PRIORITY AREAS FOR ITS GRANTMAKING, WHICH ARE: HEALTH AND WELLNESS; DIVERSITY, EQUITY AND INCLUSION; WORKFORCE AND ECONOMIC OPPORTUNITY; CIVIC ENGAGEMENT AND POLICY WORK; EARLY CHILDHOOD AND YOUTH DEVELOPMENT; CAPACITY BUILDING. OF THE OVERALL GRANTS AWARDED 19 WERE IDENTIFIED IN THE CATEGORY OF HEALTH AND WELLNESS AND INCLUDED COMPONENTS OF OTHER SOCIAL DETERMINANT CATEGORIES WITH AN AVERAGE GRANT AMOUNT AWARDED OF \$59,000. CONTINUED ON SCHEDULE O. THE REMAINING GRANTS AWARDED WERE IN THE REMAINING DETERMINANT CATEGORIES ALSO FOCUSED ON OVERALL IMPROVEMENT OF COMMUNITY HEALTH. OF THE 15 REMAINING GRANTS, THE AVERAGE AWARD AMOUNT WAS \$70,000. HEALTH AND WELLNESS GRANTS INCLUDED THE FOLLOWING: ALLEGHENY HEALTH NETWORK CENTER FOR INCLUSION HEALTH/RECOVERY MEDICINE PROGRAM TO ENHANCE RECOVERY MEDICINE SERVICES FOR JEFFERSON RESIDENTS EXPERIENCING SUBSTANCE ABUSE DISORDER AND OPIOID USE DISORDER THROUGH SUPPORT OF SOCIAL WORK, PEER RECOVERY SPECIALISTS AND OTHER SUPPORTIVE STAFF TO ESTABLISH AN ONSITE PROGRAM AT JEFFERSON HOSPITAL BY 2023. ALLEGHENY HEALTH NETWORK/JEFFERSON HOSPITAL/TALENT ATTRACTION PROGRAM TO EXECUTE AN ALLIED HEALTH TRAINING PROGRAM IN COLLABORATION WITH LOCAL EDUCATIONAL PARTNERS WHICH WILL ASSIST DIVERSE STUDENTS IN OVERCOMING IDENTIFIED BARRIERS AND CLEARLY DEFINE A PATHWAY TO BE HIRED INTO ALLIED HEALTH POSITIONS AT JEFFERSON HOSPITAL WHICH WILL STRENGTHEN THE DELIVERY OF TRUSTED HEALTH CARE. AMERICAN RED CROSS/HOME FIRE PREPAREDNESS PROGRAM TO INCREASE HOME SAFETY BY PROVIDING FREE SMOKE DETECTORS, FIRE SAFETY AND PREPAREDNESS EDUCATION WITHIN THE JEFFERSON SERVICE AREA. IN ADDITION, OFFER DIRECT ASSISTANCE TO FIRE SURVIVORS WHO LIVE IN THE JEFFERSON SERVICE AREA THROUGH PARTNERSHIPS WITH LOCAL FIRE DEPARTMENTS. ATTACK THEATRE/COMMUNITIES IN MOTION TO SUPPORT EDUCATIONAL ENGAGEMENT, PHYSICAL AND MENTAL WELL-BEING, AND SOCIAL EMOTIONAL DEVELOPMENT FOR 600 YOUTH LIVING IN DUQUESNE THROUGH MOVEMENT AND DANCE IN PARTNERSHIP WITH DUQUESNE CITY SCHOOL DISTRICT, BOYS AND GIRLS CLUB OF WESTERN PA, AND THE DUQUESNE FAMILY CENTER. BEVERLY'S BIRTHDAYS/PROMOTING HEALTH & EARLY CHILD DEVELOPMENT TO PROVIDE SUPPORT AND OPPORTUNITY TO JEFFERSON WOMEN AND PARENTS/CAREGIVERS EXPERIENCING FINANCIAL HARDSHIP DURING PREGNANCY AND THROUGH THE EARLY YEARS OF A CHILD'S LIFE BY OFFERING 20 GROUP BIRTHDAY PARTIES, 8 COMMUNITY BABY SHOWERS, PROVIDING TANGIBLE ITEMS OF SUPPORT (BABY/BIRTHDAY SUPPLIES AND CLOTHING), AND BUILDING AN AMBASSADOR PROGRAM TO GUIDE FUTURE PROGRAMMING. BHUTANESE COMMUNITY ASSOCIATION OF PITTSBURGH/SUSTAINING HOLISTIC IMMIGRANT & REFUGEE COMMUNITY HEALTH TO STRENGTHEN HEALTHY OPPORTUNITIES AND OPTIONS FOR MEMBERS OF THE LOCAL BHUTANESE COMMUNITY BY BUILDING AND RETAINING STAFF CAPACITY AND MOVING FORWARD WITH A STRATEGIC PLANNING PROCESS. CASA SAN JOS/BASIC NEEDS AND MENTAL HEALTH SERVICES FOR THE LATINO POPULATION TO INCREASE THE HEALTH AND WELLNESS OF JEFFERSON LATINO INDIVIDUALS/FAMILIES BY EXPANDING EXISTING SERVICES (SERVICE COORDINATION, INTENSIVE CASE MANAGEMENT, EMERGENCY RESPONSE, LEADERSHIP DEVELOPMENT, AND POLICY/ADVOCACY) AND PILOTING A BI-LINGUAL, CULTURALLY SENSITIVE TELEHEALTH MENTAL HEALTH PROGRAM. COMMUNITY COLLEGE OF ALLEGHENY COUNTY/EXPANDING ACCESS TO TRAINING FOR HEALTH CAREERS TO OFFER A HEALTH CAREERS SUMMER PROGRAM THROUGH CCAC SOUTH TO EXPOSE 10TH TO 12TH GRADE STUDENTS FROM LOCAL HIGH SCHOOLS TO THE VARIOUS CAREER OPPORTUNITIES STUDENTS CAN PURSUE THROUGH THE 21 ALLIED HEALTH PROGRAMS OFFERED AT CCAC. ESTEEM GROUP, INC./SOCIAL AND EMOTIONAL PROGRAMMING FOR JEFFERSON YOUTH TO PROVIDE 350 WEST MIFFLIN AREA MIDDLE SCHOOL STUDENTS (4TH AND 5TH GRADE) WITH SOCIAL AND EMOTIONAL PROGRAMMING. GLOBAL LINKS/COMMUNITY PARTNERS PROGRAM TO PROVIDE NEEDED SURPLUS MEDICAL SUPPLIES THROUGH PARTNERSHIPS WITH JEFFERSON HUMAN SERVICE AGENCIES SERVING OLDER ADULTS AND/OR LOW-INCOME INDIVIDUALS TO INCREASE ORGANIZATIONAL CAPACITY AND TO ENSURE THAT INDIVIDUALS HAVE THE NECESSARY SUPPLIES TO LEAD HEALTHY LIVES AND MAINTAIN THEIR INDEPENDENCE. HELLO NEIGHBOR/REFUGEE RESETTLEMENT AND ENGAGEMENT TO INCREASE THE HEALTH AND WELLNESS OF REFUGEE FAMILIES LIVING IN JEFFERSON COMMUNITIES BY SUPPORTING THE LAUNCH OF A NEW, FEDERALLY FUNDED RECEPTION AND PLACEMENT PROGRAM WHICH USES A VOLUNTEER-LED COMMUNITY SPONSORSHIP PROGRAM TO ENGAGE THE BROADER JEFFERSON COMMUNITY IN IMPROVING REFUGEE CULTURAL AND COMMUNITY INTEGRATION THROUGH ASSISTANCE WITH HOUSING, EDUCATION, JOBS, LANGUAGE, AND NAVIGATING AMERICAN SYSTEMS. HEUER HOUSE/GLASSPORT HEALTH AND WELLNESS TO SUPPORT THE OPERATION OF THE HEUER HOUSE FOOD PANTRY AND COMMUNITY DISTRIBUTIONS TO JEFFERSON RESIDENTS. SUPPORT OFFERED TO MITIGATE THE DISPROPORTIONATE RESOURCES AVAILABLE TO BLACK LED AGENCIES THAT FOCUS ON RECOVERY HEALTH SERVICES. MAPLE UNIFIED STUDENT ACADEMY (MUSA)/EARLY LEARNING EXPANSION TO EXPAND CAPACITY FOR CONSISTENT, HIGH-QUALITY, LOW-COST PRESCHOOL BASED IN HOMESTEAD FROM 20 TO 37 CHILDREN TO SUPPORT FAMILIES AND INCREASE OVERALL HEALTH AND WELLNESS AND FINANCIAL SUSTAINABILITY. NEIGHBORHOOD ALLIES (STEEL SMILING)/EXPLORING COMMUNITY-BASED, BLACK MENTAL HEALTH PERCEPTION TO GROW RELATIONSHIPS AND ESTABLISH TRUST WITH COMMUNITY-BASED ENTITIES IN THE SOUTH HILLS AND MON VALLEY COMMUNITIES THROUGH A LISTENING TOUR TO BETTER UNDERSTAND THE SPECIFIC, MENTAL HEALTH NEEDS EXPRESSED BY THE COMMUNITY AND WORK TOWARD EFFECTIVE AND SUSTAINABLE PROGRAMMING. THE BLESSING BOARD TO INCREASE THE QUALITY OF LIFE AND OVERALL HEALTH AND WELLNESS FOR MORE LOW-INCOME JEFFERSON FAMILIES AND INDIVIDUALS BY SUPPORTING THE OPERATIONS AND SUSTAINABILITY OF A FURNITURE BANK AT A NEW WEST MIFFLIN SITE. VENTURE OUTDOORS/OUTDOOR OPPORTUNITIES FOR ALL TO CONTINUE TO ENGAGE JEFFERSON YOUTH AND OLDER ADULTS IN OUTDOOR ACTIVITY THROUGH TARGETED PROGRAMMING PROMOTING HEALTH AND WELLNESS AND OFFER TEENS A MENTORSHIP/ INTERNSHIP PROGRAM TO EXPLORE OUTDOOR CAREERS CALLED THE OUTDOOR INCLUSION COALITION. VISION TO LEARN/VISION RESOURCES FOR STUDENTS IN JEFFERSON COMMUNITIES TO INCREASE THE HEALTH AND SCHOOL ENGAGEMENT OF SCHOOLCHILDREN IN JEFFERSON COMMUNITIES IN PARTNERSHIP WITH SCHOOL DISTRICTS (ELIZABETH-FORWARD, WEST MIFFLIN, AND BRENTWOOD) BY OFFERING VISION EXAMS TO 500 STUDENTS AND GLASSES ONSITE TO 400 STUDENTS. WESTERN PENNSYLVANIA DIAPER BANK/ACCESS TO DIAPER AND HYGIENE SUPPLIES TO EXPAND ACCESS TO FREE DIAPERS AND OTHER HYGIENE ESSENTIALS TO IMPROVE THE HEALTH AND WELL-BEING OF JEFFERSON FAMILIES IN NEED, VIA THE ABILITY TO INCREASE ACCESS BY THE DIAPER BANK TO JEFFERSON PARTNER ORGANIZATIONS. WOMEN FOR A HEALTHY ENVIRONMENT/STRENGTHENING AND SUSTAINING HEALTHY COMMUNITIES TO INCREASE AWARENESS OF ENVIRONMENTAL HEALTH FACTORS FOR EMPLOYEES AND FAMILIES IN 24 EARLY CHILD CARE CENTERS, ENGAGE TWO JEFFERSON SCHOOL DISTRICTS IN HEALTHY SCHOOLS RECOGNITION, AND CONDUCT 24 HOME ASSESSMENTS FOR JEFFERSON RESIDENTS/FAMILIES BY PROVIDING TECHNICAL ASSISTANCE ON AN ECO-HEALTHY CHECKLIST AND OFFERING LOW-COST, SUSTAINABLE SOLUTIONS THAT WILL IMPROVE HEALTH OUTCOMES FOR JEFFERSON FAMILIES/CHILDREN.

4b (Code: ) (Expenses \$ 1,243,250 including grants of \$ 1,243,250 ) (Revenue \$ 0 )

INVESTING IN LOCAL ORGANIZATIONS TO STRENGTHEN THEIR IMPACT CONTINUES TO BE A PRIORITY OF JEFFERSON REGIONAL FOUNDATION. CAPACITY BUILDING; YOUTH DEVELOPMENT; CIVIC ENGAGEMENT AND POLICY WORK; DIVERSITY, EQUITY AND INCLUSION; AND WORKFORCE AND ECONOMIC OPPORTUNITY; ARE ALSO KEY FOCUS AREAS. THE JEFFERSON REGIONAL FOUNDATION AWARDED 15 GRANTS WITHIN THOSE CATEGORIES. THE GRANTS AWARDED TO SUPPORT THE HEALTH OF THE OVERALL COMMUNITY INCLUDED THE FOLLOWING REPORTED ON SCHEDULE O. DRESS FOR SUCCESS PITTSBURGH/MOBILE SERVICES WORKFORCE DEVELOPMENT EVENTS TO INCREASE THE CONFIDENCE AND CAPACITY OF 425 LOCAL FEMALE RESIDENTS PREPARING TO ENTER THE WORKFORCE BY PROVIDING EACH WOMAN WITH APPROPRIATE INTERVIEW CLOTHING, UNIFORM ITEMS, AND CAREER SUPPORT DELIVERED THROUGH A MOBILE BOUTIQUE IN PARTNERSHIP WITH JEFFERSON AREA ORGANIZATIONS. FIRST STEP RECOVERY HOMES/ADDICTION RECOVERY SUPPORT TO ENHANCE GENERAL OPERATING SUPPORT TO PROVIDE SUPPORT SERVICES TO MEN SUFFERING FROM THE DISEASE OF ADDICTION WITH A HISTORY OF CRIMINAL JUSTICE INVOLVEMENT. SUPPORT OFFERED TO MITIGATE THE DISPROPORTIONATE RESOURCES AVAILABLE TO BLACK LED AGENCIES THAT FOCUS ON RECOVERY HEALTH SERVICES. FOOTBRIDGE FOR FAMILIES/RAPID RESPONSE FUNDING TO SUPPORT JEFFERSON FAMILIES TO ASSIST 3040 JEFFERSON RESIDENTS DURING TIMES OF SHORT TERM FINANCIAL CRISIS AND PROVIDE CONNECTIONS TO ADDITIONAL SUPPORTS THROUGH AN INNOVATIVE TECHNOLOGY PLATFORM WHICH FACILITATES RAPID FINANCIAL RESPONSE TO VENDORS. GIRL SCOUTS OF WESTERN PENNSYLVANIA/MON VALLEY OUTREACH TO BUILD A STRONG SENSE OF SELF AND CONFIDENCE FOR 40 GIRLS IN GRADES 4-6 THROUGH PARTICIPATION IN THE NATIONAL GIRL SCOUTS LEADERSHIP EXPERIENCE WITH STAFF-BASED SUPPORT IN PARTNERSHIP WITH PROPEL HOMESTEAD, PROPEL MCKEESPORT, AND THE DRAGON'S DEN. LITERACY PITTSBURGH/BRIDGING THE GAP FROM LEARNING TO EARNING TO FOSTER A LIFETIME OF SUCCESS FOR JEFFERSON ADULT LEARNERS BY EXPANDING EMPLOYMENT OPPORTUNITIES THROUGH CAREER PATHWAYS IN CONSTRUCTION AND HEALTHCARE, IMPROVING EMPLOYMENT AND EDUCATIONAL OUTCOMES FOR CARETAKERS AND THEIR CHILDREN, AND IMPARTING VITAL DIGITAL SKILLS. MELTING POT MINISTRIES/YOUTH AND FAMILY SUPPORT TO SUPPORT POSITIVE DEVELOPMENT FOR YOUTH AND THEIR CAREGIVERS IN SOUTH PARK, BALDWIN-WHITEHALL, AND BETHEL PARK BY PROVIDING AFTERSCHOOL AND SUMMER PROGRAMMING FOCUSED ON EDUCATIONAL, SOCIAL-EMOTIONAL, AND CULTURAL LIFE CHALLENGES. PENNSYLVANIA WOMEN WORK/RISE EMPLOYMENT SERVICES FOR IMMIGRANTS TO PREPARE 100 IMMIGRANTS RESIDING IN JEFFERSON COMMUNITIES FOR LIFE-SUSTAINING EMPLOYMENT OPPORTUNITIES BY PROVIDING INSTRUCTION, INDIVIDUALIZED COUNSELING, MENTORSHIP, AND SHORT-TERM TRAINING. PITTSBURGH URBAN LEADERSHIP SERVICE EXPERIENCE (PULSE)/EXPANDING NONPROFIT STAFF CAPACITY TO PROVIDE EXPANDED STAFF CAPACITY TO JEFFERSON NONPROFIT ORGANIZATIONS BY SUPPORTING A UNIQUE LEADERSHIP DEVELOPMENT PROGRAM WHICH CULTIVATES A COMMUNITY OF YOUNG SERVANT LEADERS WHO ARE UNIVERSITY GRADUATES TO PARTNER WITH PITTSBURGH NONPROFITS FOR A YEAR OF SERVICE AND

LEADERSHIP.PITTSBURGHERS FOR PUBLIC TRANSIT/TRANSIT CIVIC ENGAGEMENT TO ASSIST JEFFERSON RESIDENTS IN ACCESSING CRITICAL HEALTH, EDUCATION, AND FOOD SITES BY ORGANIZING TRANSIT RIDERS AND WORKERS TO DEVELOP AND ADVOCATE FOR A STATEWIDE TRANSIT FUNDING SOLUTION.PRIORITY AREA: CIVIC ENGAGEMENT AND POLICY WORKPUBLICSOURCE/CIVIC ENGAGEMENT, STORYTELLING, AND JOURNALISMTO INCREASE JEFFERSON ORGANIZATIONS AND RESIDENTS UNDERSTANDING OF CIVIC ENGAGEMENT BY PROVIDING RESOURCES AND SIX EDUCATIONAL WORKSHOPS ON COMMUNITY ENGAGEMENT/STORYTELLING TAUGHT BY EXPERIENCED JOURNALISTS AND DRAW ATTENTION TO THE JEFFERSON AREA BY HIGHLIGHTING 15 STORIES WHICH MAY INCLUDE FIRST-PERSON ESSAYS.THREE RIVERS WORKFORCE DEVELOPMENT BOARD (PARTNER4WORK)/CAREER EXPANSION SITES, LABOR MARKET DATA, AND BANKWORKS\$ TRAININGTO INCREASE WORKFORCE DEVELOPMENT SERVICES IN THE JEFFERSON AREA BY DELIVERING CAREER PROGRAMMING FOR 40 JEFFERSON RESIDENTS LEVERAGING THE PUBLIC WORKFORCE SYSTEM, TRAINING 15 PARTICIPANTS IN OCCUPATIONAL SKILL TRAINING IN THE SOUTH HILLS AND DELIVERING QUARTERLY LABOR MARKET UPDATES TO KEY STAKEHOLDERS.TRYING TOGETHER/INCREASING CHILDCARE QUALITYTO INCREASE ACCESS OF JEFFERSON AREA LOW-INCOME WORKING PARENTS AND CHILDREN TO QUALITY EARLY CHILDCARE EDUCATION BY PARTNERING WITH LOWER-RATED JEFFERSON CHILDCARE PROVIDERS (BOTH COMMERCIAL AND HOME-BASED) TO INCREASE THEIR STATE STANDARD QUALITY RATING.VETERANS BREAKFAST CLUB/EXPANSION AND MEMBERSHIP MODELTO SUPPORT LOCAL VETERANS AND THEIR MENTAL HEALTH BY RE-INTRODUCING LOCAL, IN-PERSON STORYTELLING EVENTS IN THE JEFFERSON AREA (8 IN MCKEESPORT AND 4 IN BETHEL PARK), EXPANDING ONLINE PROGRAMMING, LAUNCHING A NEW MEMBERSHIP MODEL, AND ADDING PART-TIME EVENT STAFF CAPACITY.YOUTHPLACES/MON VALLEY EXPANSIONTO SUPPORT POSITIVE YOUTH DEVELOPMENT FOR 100 TEENS AGES 12-18 IN MCKEESPORT AND DUQUESNE BY EXPANDING PROGRAM OFFERINGS AND OPENING A NEW LOCATION IN DUQUESNE.YWCA OF GREATER PITTSBURGH/ECONOMIC AND EQUITY ADVANCEMENTTO PROVIDE PROGRAM SUPPORT TO 31 JEFFERSON INDIVIDUALS OR FAMILIES FOR HOUSING AND UTILITY ASSISTANCE AND ADVANCE THE PAY EQUITY CAMPAIGN TO IMPROVE WORK CULTURE AND CONDITIONS FOR ALL WOMEN IN THE REGION.

**4c** (Code: ) (Expenses \$ **648,011** including grants of \$ ) (Revenue \$ **0** )

NEW STRATEGIC PLAN AT ITS DECEMBER 2020 BOARD MEETING, JEFFERSON REGIONAL FOUNDATION ADOPTED A NEW THREE-YEAR STRATEGIC PLAN AFTER A THREE-SESSION REMOTE BOARD RETREAT AND SEVERAL MONTHS OF WORK. THIS PLAN WAS INFORMED BY A THIRD-PARTY STAKEHOLDER SURVEY AND INTERVIEWS, BOARD AND GRANTEE INSIGHTS, AND COMMUNITY DATA GATHERED FROM ONGOING COMMUNITY ENGAGEMENT EFFORTS INCLUDING COMMUNITY CONVERSATIONS, AN ANNUAL FORUM EVENT AND A 100+ MEMBER NETWORK OF NONPROFITS HOSTED BY THE FOUNDATION. THE FOUNDATION CONFIRMED KEEPING ITS MISSION AND OBLIGATIONS TO THE COMMUNITY FRONT AND CENTER. CONTINUED ON SCHEDULE O.THE FIVE STRATEGIC GOALS INCLUDE:1. INVEST THROUGH GRANT-MAKING AND COMMUNITY ENGAGEMENT STRATEGIES IN SIX NEW PRIORITIES (NOTED IN PART III, LINE 1A) 2. CONTINUE TO FOCUS ON THE JEFFERSON HOSPITAL LEGACY SERVICE AREA (COMMUNITIES OUTSIDE OF THE CITY OF PITTSBURGH BUT IN ALLEGHENY COUNTY) 3. PURSUE PARALLEL GOALS OF ADDRESSING COMMUNITY NEEDS WHILE MAINTAINING AN EQUIVALENT LEVEL OF PHILANTHROPIC RESOURCES TO HELP FUTURE GENERATIONS ADDRESS THE NEEDS OF THEIR TIME.4. APPLY A LENS OF DIVERSITY, EQUITY, AND INCLUSION IN EVERY ASPECT OF OUR WORK IN THE COMMUNITY AND ACROSS OUR INTERNAL PRACTICES.5. SUPPORT A CULTURE OF LEARNING AND CONTINUOUS IMPROVEMENT IN OUR GOVERNANCE PRACTICES, INTERNAL SYSTEMS, AND EVALUATION. THE ACTION PLAN WITH SPECIFIC OBJECTIVES AND INDICATORS IS NOW BEING INTEGRATED AND IMPLEMENTED ACROSS THE BOARD'S STANDING COMMITTEES AS WELL AS A DEI TASK FORCE. THE BOARD'S DEI TASK FORCE DEVELOPED A PLAN AND PRINCIPLES, HOSTED A BOARD EQUITY BOOK CLUB, AND OFFERED ACCESS TO BOOKS, ARTICLES, AND TRAININGS. THE BOARD ALSO BECAME MORE DIVERSE AS NEW MEMBERS WERE WELCOMED. IN ONE FISCAL YEAR, THE BOARD MOVED FROM BEING ALMOST EXCLUSIVELY MALE (18/2) TO AN IMPROVED REPRESENTATION (13 MEN/7 WOMEN). AS THIS RETURN WAS PREPARED, THE BOARD ALSO INCLUDED TWO PEOPLE OF COLOR (10%) AND HAS A COMMITTED TO CONTINUING TO BUILD ITS DIVERSITY WHILE ATTRACTING CANDIDATES WHO CAN CONTRIBUTE INTERESTS, SKILLS, AND EXPERTISE WITH A COMMITMENT TO THE JEFFERSON AREA. THE MAJORITY OF THE BOARD LIVE AND WORK IN THE JEFFERSON AREA. THE STRATEGIC PLAN AFFIRMED THE FOUNDATION'S ROLE IN EXTENDING THE MISSION OF JEFFERSON HOSPITAL IN COMMUNITY GRANTMAKING AND THROUGH ITS EXPANDING COMMITMENT TO COMMUNITY ENGAGEMENT ACTIVITIES. THESE ARE HIGHLIGHTED BELOW. THE JEFFERSON COLLABORATIVE WAS INITIATED IN THE FALL OF 2015 IN RESPONSE TO THE REQUEST OF LOCAL NONPROFITS AND HAS CONTINUED TO EVOLVE WITH QUARTERLY MEETINGS WHICH HAVE GROWN TO AVERAGE 97 PARTICIPANTS, ONGOING ACTION TEAMS AND 100+ MEMBER ORGANIZATIONS OF THIS NETWORK OF ORGANIZATIONS COMMITTED TO HEALTHY COMMUNITIES IN THE JEFFERSON AREA. A SEVENTEEN-MEMBER VISION COUNCIL MEETS QUARTERLY TO PROVIDE LEADERSHIP TO THE COLLABORATIVE AND HAS REPRESENTATION FROM KEY INSTITUTIONS AND DIVERSE STAKEHOLDERS INCLUDING THE COO OF JEFFERSON HOSPITAL/AHN. THE FOUNDATION AND COLLABORATIVE PUBLISH A JEFFERSON COMMUNITY DIRECTORY UTILIZED BY JEFFERSON HOSPITAL STAFF WHICH IS A RESOURCE GUIDE FOR KEY STAKEHOLDERS IN THE AREA AND IS NOW IN ITS THIRD PRINT EDITION AND AVAILABLE ON OUR WEBSITE. THE FOUNDATION STAFF INCLUDES A FULL-TIME COMMUNITY ENGAGEMENT MANAGER TO SUPPORT THE JEFFERSON COLLABORATIVE AND OTHER COMMUNITY ACTIVITIES OF THE FOUNDATION. SIGNIFICANT ACCOMPLISHMENTS OF OUR COMMUNITY ENGAGEMENT DURING THIS FISCAL PERIOD INCLUDE:THE JEFFERSON COLLABORATIVE EXPERIENCED 13% GROWTH SINCE 2020 DURING THE PERIOD WHEN EVENTS WERE ALL VIRTUAL AND HAS NOW GROWN TO A DYNAMIC 108-MEMBER NETWORK OF ORGANIZATIONS REPRESENTING NONPROFITS AND CIVIC ORGANIZATIONS SERVING THE JEFFERSON AREA. NEW ACTION TEAMS MET THROUGHOUT THE YEAR TO FOCUS ON KEY AREAS OF DIVERSITY & EQUITY/RACIAL JUSTICE AND CIVIC & POLICY ENGAGEMENT AND WERE IMPLEMENTING THEIR PLANS. THE DEI TEAM OFFERED A DAYLONG TRAINING IN IMPLICIT BIAS ATTENDED BY 60 COLLABORATIVE ORGANIZATIONS. THE CIVIC ENGAGEMENT TEAM HAD SEVERAL MONTHS OF TRAINING FROM A LOCAL ADVOCACY EXPERT AND IS COMPLETING THE DEVELOPMENT OF A CIVIC/POLICY PLAN FOR THE COLLABORATIVE.COLLABORATIVE PROGRAMMING TOPICS INCLUDED: PURSUING EQUITY AND CHANGE THROUGH COLLECTIVE ACTION, EXPLORING TRENDS AND EQUITY IN OUR NONPROFIT SECTOR, AND A NEW MEMBER VIRTUAL NETWORKING EVENT CALLED COLLABORATIVE CONNECT.JEFFERSON FORUM: JEFFERSON FORUM (8TH ANNUAL CONFERENCE) CENTERED AROUND THE THEME OF NAVIGATING THE UNKNOWN AND HOW WE HAVE ADAPTED TO SHIFTING DEMANDS AND CREATED NEW WAYS OF OPERATING IN OUR PROFESSIONAL AND PERSONAL LIVES. WE CHALLENGED OUR NEARLY 200 ATTENDEES FROM OVER 100 ORGANIZATIONS TO CONSIDER WHERE POSSIBILITIES AND OPPORTUNITIES EXIST, EMBRACING THESE CHANGES THAT FRAME OUR DAILY LIVES WITH UNITY AND INGENUITY.

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

**4e** **Total program service expenses** **3,383,261**

Part IV Checklist of Required Schedules

Table with 3 columns: Question number, Question text, and Yes/No response columns. Rows include questions 1 through 21 regarding organizational requirements and reporting.

**Part IV Checklist of Required Schedules (continued)**

		Yes	No
<b>22</b>	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? <i>If "Yes," complete Schedule I, Parts I and III</i> . . . . .		No
<b>23</b>	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? <i>If "Yes," complete Schedule J</i> . . . . .	Yes	
<b>24a</b>	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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> . . . . .		No
<b>24b</b>	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .		
<b>24c</b>	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .		
<b>24d</b>	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
<b>25a</b>	<b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .		No
<b>25b</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? <i>If "Yes," complete Schedule L, Part I</i>		No
<b>26</b>	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?		No
<b>27</b>	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? <i>If "Yes," complete Schedule L, Part III</i> . . . . .		No
<b>28</b>	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):		
<b>28a</b>	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .		No
<b>28b</b>	A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .		No
<b>28c</b>	A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .		No
<b>29</b>	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> . . . . .		No
<b>30</b>	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?		No
<b>31</b>	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		No
<b>32</b>	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .		No
<b>33</b>	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3?		No
<b>34</b>	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> . . . . .	Yes	
<b>35a</b>	Did the organization have a controlled entity within the meaning of section 512(b)(13)?		No
<b>35b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .		
<b>36</b>	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .		No
<b>37</b>	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? <i>If "Yes," complete Schedule R, Part VI</i> . . . . .		No
<b>38</b>	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. . . . .	Yes	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

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

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

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

<p><b>2a</b> 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 . . . . .</p>	<p><b>2a</b> <span style="float: right;">8</span></p>			
<p><b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.</p>	<p><b>2b</b></p>	<p>Yes</p>		
<p><b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .</p>	<p><b>3a</b></p>		<p>No</p>	
<p><b>b</b> If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation in Schedule O . . . . .</i></p>	<p><b>3b</b></p>			
<p><b>4a</b> 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)?</p>	<p><b>4a</b></p>		<p>No</p>	
<p><b>b</b> <del>Enter the name of the foreign country: _____</del> See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).</p>	<p><b>4b</b></p>			
<p><b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .</p>	<p><b>5a</b></p>		<p>No</p>	
<p><b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</p>	<p><b>5b</b></p>		<p>No</p>	
<p><b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . . . .</p>	<p><b>5c</b></p>			
<p><b>6a</b> 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? . . . . .</p>	<p><b>6a</b></p>		<p>No</p>	
<p><b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .</p>	<p><b>6b</b></p>			
<p><b>7 Organizations that may receive deductible contributions under section 170(c).</b></p>				
<p><b>a</b> 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? . . . . .</p>	<p><b>7a</b></p>		<p>No</p>	
<p><b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .</p>	<p><b>7b</b></p>			
<p><b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .</p>	<p><b>7c</b></p>		<p>No</p>	
<p><b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year . . . . .</p>	<p><b>7d</b></p>			
<p><b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</p>	<p><b>7e</b></p>		<p>No</p>	
<p><b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</p>	<p><b>7f</b></p>		<p>No</p>	
<p><b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .</p>	<p><b>7g</b></p>			
<p><b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .</p>	<p><b>7h</b></p>			
<p><b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?</p>	<p><b>8</b></p>			
<p><b>9 Sponsoring organizations maintaining donor advised funds.</b></p>				
<p><b>a</b> Did the sponsoring organization make any taxable distributions under section 4966?</p>	<p><b>9a</b></p>			
<p><b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .</p>	<p><b>9b</b></p>			
<p><b>10 Section 501(c)(7) organizations.</b> Enter:</p>				
<p><b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 . . . . .</p>	<p><b>10a</b></p>			
<p><b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</p>	<p><b>10b</b></p>			
<p><b>11 Section 501(c)(12) organizations.</b> Enter:</p>				
<p><b>a</b> Gross income from members or shareholders . . . . .</p>	<p><b>11a</b></p>			
<p><b>b</b> Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)</p>	<p><b>11b</b></p>			
<p><b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?</p>				
<p><b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year.</p>	<p><b>12b</b></p>			
<p><b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b></p>				
<p><b>a</b> Is the organization licensed to issue qualified health plans in more than one state? . . . . .</p>	<p><b>13a</b></p>			
<p><b>Note.</b> See the instructions for additional information the organization must report on Schedule O.</p>				
<p><b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans . . . . .</p>	<p><b>13b</b></p>			
<p><b>c</b> Enter the amount of reserves on hand . . . . .</p>	<p><b>13c</b></p>			
<p><b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? . . . . .</p>	<p><b>14a</b></p>		<p>No</p>	
<p><b>b</b> If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation in Schedule O . . . . .</i></p>	<p><b>14b</b></p>			
<p><b>15</b> 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? . . . . .</p>	<p><b>15</b></p>		<p>No</p>	
<p><b>16</b> If the organization is a trust, did it file Form 720, Schedule E, to report the section 4968 excise tax on net investment income? . . . . .</p>	<p><b>16</b></p>		<p>No</p>	
<p><i>If "Yes," complete Form 4720, Schedule O.</i></p>				
<p><b>17 Section 501(c)(21) organizations.</b> 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? . . . . .</p>	<p><b>17</b></p>			
<p><i>If "Yes," complete Form 6069.</i></p>				

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members... 1b Enter the number of voting members included... 2 Did any officer, director, trustee, or key employee have a family relationship... 3 Did the organization delegate control over management duties... 4 Did the organization make any significant changes to its governing documents... 5 Did the organization become aware during the year of a significant diversion of the organization's assets... 6 Did the organization have members or stockholders... 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? 7b 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: 8a The governing body? 8b Each committee with authority to act on behalf of the governing body? 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates? 10b 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? 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? 11b Describe on Schedule O the process, if any, used by the organization to review this Form 990. 12a Did the organization have a written conflict of interest policy? If "No," go to line 13 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done 13 Did the organization have a written whistleblower policy? 14 Did the organization have a written document retention and destruction policy? 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? 15a The organization's CEO, Executive Director, or top management official 15b Other officers or key employees of the organization If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions. 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? 16b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?

Section C. Disclosure

Table with 3 columns: Question, Yes, No. Rows include: 17 List the states with which a copy of this Form 990 is required to be filed PA 18 Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. [X] Own website [ ] Another's website [X] Upon request [ ] Other (explain in Schedule O) 19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. 20 State the name, address, and telephone number of the person who possesses the organization's books and records: CHARLES R MODISPACHER PRESIDENT 470 STREETS RUN ROAD SUITE 301 PITTSBURGH, PA 15236 (412) 267-6766

**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, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) RICHARD W TALARICO BOARD CHAIR	2.00	X		X				0	0	0
(2) GARY L EVANS BOARD VICE CHAIR	2.00	X		X				0	0	0
(3) EDWARD R MARASCO SECRETARY	2.00	X		X				0	0	0
(4) CHARLES R MODISPACHER PRESIDENT	20.00	X		X			50,000	0	0	0
(5) DR RICHARD F COLLINS DIRECTOR	1.00	X						0	0	0
(6) JOHN J DEMPSTER DIRECTOR	1.00	X						0	0	0
(7) GREGORY A HARBAUGH DIRECTOR	1.00	X						0	0	0
(8) AARON B BILLGER DIRECTOR	1.00	X						0	0	0
(9) GREGORY M DEVINE DIRECTOR	1.00	X						0	0	0
(10) DR MARK P GANNON DIRECTOR	1.00	X						0	0	0
(11) DANIEL A ONORATO DIRECTOR	1.00	X						0	0	0
(12) FRANCES SMITH ROHRICH DIRECTOR	1.00	X						0	0	0
(13) TIFFANY EVANS DIRECTOR	1.00	X						0	0	0
(14) HELEN FALLON DIRECTOR	1.00	X						0	0	0
(15) VIRGINIA WEIDA DIRECTOR	1.00	X						0	0	0
(16) CAITLIN GREEN DIRECTOR	1.00	X						0	0	0
(17) ERIN ICKES DIRECTOR	1.00	X						0	0	0



**Part VIII Statement of Revenue**

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514																																																
Contributions, Gifts, Grants, and Other Amt Similar Amounts			<table border="1"> <tr> <td><b>1a</b> Federated campaigns . . . . .</td> <td><b>1a</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>b</b> Membership dues . . . . .</td> <td><b>1b</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>c</b> Fundraising events . . . . .</td> <td><b>1c</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>d</b> Related organizations . . . . .</td> <td><b>1d</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>e</b> Government grants (contributions) . . . . .</td> <td><b>1e</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>f</b> All other contributions, gifts, grants, and similar amounts not included above . . . . .</td> <td><b>1f</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><b>g</b> Noncash contributions included in lines 1a - 1f:\$ . . . . .</td> <td><b>1g</b></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2"><b>h Total.</b> Add lines 1a-1f . . . . .</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>				<b>1a</b> Federated campaigns . . . . .	<b>1a</b>					<b>b</b> Membership dues . . . . .	<b>1b</b>					<b>c</b> Fundraising events . . . . .	<b>1c</b>					<b>d</b> Related organizations . . . . .	<b>1d</b>					<b>e</b> Government grants (contributions) . . . . .	<b>1e</b>					<b>f</b> All other contributions, gifts, grants, and similar amounts not included above . . . . .	<b>1f</b>					<b>g</b> Noncash contributions included in lines 1a - 1f:\$ . . . . .	<b>1g</b>					<b>h Total.</b> Add lines 1a-1f . . . . .					
<b>1a</b> Federated campaigns . . . . .	<b>1a</b>																																																					
<b>b</b> Membership dues . . . . .	<b>1b</b>																																																					
<b>c</b> Fundraising events . . . . .	<b>1c</b>																																																					
<b>d</b> Related organizations . . . . .	<b>1d</b>																																																					
<b>e</b> Government grants (contributions) . . . . .	<b>1e</b>																																																					
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<b>h Total.</b> Add lines 1a-1f . . . . .																																																						
<b>Program Service Revenue</b>	<b>2a</b>	Business Code																																																				
	<b>b</b>																																																					
	<b>c</b>																																																					
	<b>d</b>																																																					
	<b>e</b>																																																					
	<b>f</b> All other program service revenue.																																																					
	<b>9 Total.</b> Add lines 2a-2f. . . . .																																																					
<b>3</b> Investment income (including dividends, interest, and other similar amounts)			1,755,115			1,755,115																																																
<b>4</b> Income from investment of tax-exempt bond proceeds																																																						
<b>5</b> Royalties . . . . .																																																						
<b>Other Revenue</b>	<b>6a</b> Gross rents	(i) Real																																																				
		(ii) Personal																																																				
	<b>b</b> Less: rental expenses	<b>6b</b>																																																				
	<b>c</b> Rental income or (loss)	<b>6c</b>																																																				
	<b>d</b> Net rental income or (loss) . . . . .																																																					
	<b>7a</b> Gross amount from sales of assets other than inventory	(i) Securities	24,804,094																																																			
		(ii) Other																																																				
		<b>b</b> Less: cost or other basis and sales expenses	<b>7b</b>	17,874,708																																																		
	<b>c</b> Gain or (loss)	<b>7c</b>	6,929,386																																																			
	<b>d</b> Net gain or (loss) . . . . .			6,929,386		6,929,386																																																
<b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . .	<b>8a</b>																																																					
	<b>b</b> Less: direct expenses	<b>8b</b>																																																				
<b>c</b> Net income or (loss) from fundraising events . . . . .																																																						
<b>9a</b> Gross income from gaming activities. See Part IV, line 19 . . . . .	<b>9a</b>																																																					
	<b>b</b> Less: direct expenses . . . . .	<b>9b</b>																																																				
<b>c</b> Net income or (loss) from gaming activities . . . . .																																																						
<b>10a</b> Gross sales of inventory, less returns and allowances . . . . .	<b>10a</b>																																																					
	<b>b</b> Less: cost of goods sold . . . . .	<b>10b</b>																																																				
<b>c</b> Net income or (loss) from sales of inventory . . . . .																																																						
Miscellaneous Revenue	Business Code																																																					
<b>11a</b>																																																						
<b>b</b>																																																						
<b>c</b>																																																						
<b>d</b> All other revenue . . . . .																																																						
<b>e Total.</b> Add lines 11a-11d . . . . .																																																						
<b>12 Total revenue.</b> See instructions . . . . .			8,684,501	0	0	8,684,501																																																

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,735,250	2,735,250		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	245,176	177,831	67,345	
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	255,954	185,648	70,306	
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	9,201	6,674	2,527	
<b>9</b> Other employee benefits	44,554	32,316	12,238	
<b>10</b> Payroll taxes	38,461	27,896	10,565	
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management				
<b>b</b> Legal	18,363	10,100	8,263	
<b>c</b> Accounting	25,775	14,176	11,599	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	319,010		319,010	
<b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	84,272	46,350	37,922	
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses	10,150	7,714	2,436	
<b>14</b> Information technology	35,749	28,599	7,150	
<b>15</b> Royalties				
<b>16</b> Occupancy	23,562	17,907	5,655	
<b>17</b> Travel	230	184	46	
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	20,280	15,413	4,867	
<b>20</b> Interest				
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	17,497		17,497	
<b>23</b> Insurance	10,618	8,070	2,548	
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> PROGRAM INITIATIVES	50,266	50,266		
<b>b</b> DUES & MEMBERSHIPS	15,660	11,902	3,758	
<b>c</b> STAFF & BOARD DEVELOPME	4,941	3,755	1,186	
<b>d</b> REPAIRS & MAINTENANCE	2,853	2,168	685	
<b>e</b> All other expenses	2,517	1,042	1,475	
<b>25</b> Total functional expenses. Add lines 1 through 24e	3,970,339	3,383,261	587,078	0
<b>26</b> 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 <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**

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

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash-non-interest-bearing . . . . .		<b>1</b>	
	<b>2</b> Savings and temporary cash investments	447,620	<b>2</b>	300,266
	<b>3</b> Pledges and grants receivable, net . . . . .		<b>3</b>	
	<b>4</b> Accounts receivable, net . . . . .		<b>4</b>	
	<b>5</b> Loans and other receivables from 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		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		<b>6</b>	
	<b>7</b> Notes and loans receivable, net . . . . .		<b>7</b>	
	<b>8</b> Inventories for sale or use . . . . .		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges . . . . .	18,638	<b>9</b>	60,759
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	147,528		
	<b>b</b> Less: accumulated depreciation	81,543	14,601	65,985
	<b>11</b> Investments—publicly traded securities . . . . .	120,819,107	<b>11</b>	99,734,597
	<b>12</b> Investments—other securities. See Part IV, line 11 . . . . .	4,200,490	<b>12</b>	5,451,330
	<b>13</b> Investments—program-related. See Part IV, line 11 . . . . .		<b>13</b>	
	<b>14</b> Intangible assets . . . . .		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11	0	<b>15</b>	8,285
<b>16 Total assets:</b> Add lines 1 through 15 (must equal line 33) . . . . .	125,500,456	<b>16</b>	105,621,222	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	104,314	<b>17</b>	85,715
	<b>18</b> Grants payable . . . . .	1,132,000	<b>18</b>	799,000
	<b>19</b> Deferred revenue . . . . .		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities . . . . .		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D		<b>25</b>	
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	1,236,314	<b>26</b>	884,715
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions . . . . .	124,264,142	<b>27</b>	104,736,507
	<b>28</b> Net assets with donor restrictions		<b>28</b>	
	<b>Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds . . . . .		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building or equipment fund . . . . .		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds		<b>31</b>	
	<b>32</b> Total net assets or fund balances	124,264,142	<b>32</b>	104,736,507
<b>33</b> Total liabilities and net assets/fund balances	125,500,456	<b>33</b>	105,621,222	

**Part XI Reconciliation of Net Assets**

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

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	8,684,501
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	3,970,339
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	4,714,162
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	124,264,142
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	-24,241,797
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	0
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (A))	<b>10</b>	104,736,507

**Part XII Financial Statements and Reporting**

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

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		No
<b>b</b>	Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	Yes	
<b>c</b>	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	Yes	
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		No
<b>b</b>	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.		

**Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

**Form 990, Special Condition Description:**

**Special Condition Description**

2021

Open to Public Inspection

SCHEDULE A (Form 990)

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

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

Department of the Treasury Internal Revenue Service

Name of the organization JEFFERSON REGIONAL FOUNDATION

Employer identification number

56-2420913

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
2 A school described in section 170(b)(1)(A)(ii).
3 A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
4 A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii).
5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv).
6 A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi).
8 A community trust described in section 170(b)(1)(A)(vi).
9 An agricultural research organization described in 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land grant college of agriculture.
10 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions...
11 An organization organized and operated exclusively to test for public safety.
12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
a Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization.
b Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s).
c Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions).
d Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated.
e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations 1
g Provide the following information about the supported organization(s).

Table with 6 columns: (i) Name of supported organization, (ii) EIN, (iii) Type of organization, (iv) Is the organization listed in your governing document?, (v) Amount of monetary support, (vi) Amount of other support. Row 1: (A) JEFFERSON HOSPITAL, 251260215, 3, Yes, 0, 0. Total: 1, 0, 0.

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**  
 (Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge..						
<b>4 Total.</b> Add lines 1 through 3						
<b>5</b> 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) . . . . .						
<b>6 Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>7</b> Amounts from line 4. . . . .						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>11 Total support.</b> Add lines 7 through 10						
<b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .					<b>12</b>	
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2021 (line 6, column (f) divided by line 11, column (f)) . . . . .	<b>14</b>	
<b>15</b> Public support percentage for 2020 Schedule A, Part II, line 14 . . . . .	<b>15</b>	
<b>16a 33 1/3% support test—2021.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 33 1/3% support test—2020.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>17a 10%-facts-and-circumstances test—2021.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>b 10%-facts-and-circumstances test—2020.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . .		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . .		<input type="checkbox"/>

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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . .						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
<b>c</b> Add lines 7a and 7b. .						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
<b>9</b> Amounts from line 6. . . . .						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
<b>c</b> Add lines 10a and 10b.						
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .						
<b>14 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here.</b> . . . . . <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2021 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	
<b>16</b> Public support percentage from 2020 Schedule A, Part III, line 15 . . . . .	<b>16</b>	

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2021</b> (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	
<b>18</b> Investment income percentage from <b>2020</b> Schedule A, Part III, line 17 . . . . .	<b>18</b>	

**19a 33 1/3% support tests—2021.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . .

**b 33 1/3% support tests—2020.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . .

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . . .

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

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

**Part IV Supporting Organizations** (continued)

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

**Section B. Type I Supporting Organizations**

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

**Section C. Type II Supporting Organizations**

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

**Section D. All Type III Supporting Organizations**

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

**Section E. Type III Functionally-Integrated Supporting Organizations**

**1** Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):

- a**  The organization satisfied the Activities Test. Complete **line 2** below.
- b**  The organization is the parent of each of its supported organizations. Complete **line 3** below.
- c**  The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions)

**2** Activities Test. **Answer lines 2a and 2b below.**

	Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
<b>b</b> Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
<b>2a</b>	Yes	
<b>2b</b>	Yes	

**3** Parent of Supported Organizations. **Answer lines 3a and 3b below.**

<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No", provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI. the role played by the organization in this regard.</i>		
<b>3a</b>		
<b>3b</b>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1**  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

**Section A - Adjusted Net Income**

(A) Prior Year

(B) Current Year  
(optional)

<b>1</b> Net short-term capital gain	<b>1</b>		
<b>2</b> Recoveries of prior-year distributions	<b>2</b>		
<b>3</b> Other gross income (see instructions)	<b>3</b>		
<b>4</b> Add lines 1 through 3	<b>4</b>		
<b>5</b> Depreciation and depletion	<b>5</b>		
<b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	<b>6</b>		
<b>7</b> Other expenses (see instructions)	<b>7</b>		
<b>8 Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)	<b>8</b>		

**Section B - Minimum Asset Amount**

(A) Prior Year

(B) Current Year  
(optional)

<b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	<b>1</b>		
<b>a</b> Average monthly value of securities	<b>1a</b>		
<b>b</b> Average monthly cash balances	<b>1b</b>		
<b>c</b> Fair market value of other non-exempt-use assets	<b>1c</b>		
<b>d Total</b> (add lines 1a, 1b, and 1c)	<b>1d</b>		
<b>e Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):			
<b>2</b> Acquisition indebtedness applicable to non-exempt use assets	<b>2</b>		
<b>3</b> Subtract line 2 from line 1d	<b>3</b>		
<b>4</b> Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	<b>4</b>		
<b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)	<b>5</b>		
<b>6</b> Multiply line 5 by 0.035	<b>6</b>		
<b>7</b> Recoveries of prior-year distributions	<b>7</b>		
<b>8 Minimum Asset Amount</b> (add line 7 to line 6)	<b>8</b>		

**Section C - Distributable Amount**

Current Year

<b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)	<b>1</b>	
<b>2</b> Enter 85% of line 1	<b>2</b>	
<b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)	<b>3</b>	
<b>4</b> Enter greater of line 2 or line 3	<b>4</b>	
<b>5</b> Income tax imposed in prior year	<b>5</b>	
<b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	<b>6</b>	

- 7**  Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

(continued)

Section D - Distributions		Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>	
<b>4</b> Amounts paid to acquire exempt-use assets	<b>4</b>	
<b>5</b> Qualified set-aside amounts (prior IRS approval required - provide details in <b>Part VI</b> )	<b>5</b>	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions	<b>6</b>	
<b>7 Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions	<b>8</b>	
<b>9</b> Distributable amount for 2021 from Section C, line 6	<b>9</b>	
<b>10</b> Line 8 amount divided by Line 9 amount	<b>10</b>	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2021	(iii) Distributable Amount for 2021
<b>1</b> Distributable amount for 2021 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2021 (reasonable cause required-- explain in <b>Part VI</b> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2021:			
<b>a</b> From 2016. . . . .			
<b>b</b> From 2017. . . . .			
<b>c</b> From 2018. . . . .			
<b>d</b> From 2019. . . . .			
<b>e</b> From 2020. . . . .			
<b>f Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2021 distributable amount			
<b>i</b> Carryover from 2016 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2021 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2021 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>6</b> Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>7 Excess distributions carryover to 2022.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2017. . . . .			
<b>b</b> Excess from 2018. . . . .			
<b>c</b> Excess from 2019. . . . .			
<b>d</b> Excess from 2020. . . . .			
<b>e</b> Excess from 2021. . . . .			

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

### Facts And Circumstances Test

Return Reference	Explanation
PART IV, SECTION D, LINE 3:	THE FOUNDATION'S BOARD INCLUDES FIVE DIRECTORS WHO HAVE BEEN APPOINTED BY THE BOARD OF JEFFERSON HOSPITAL AND THE ALLEGHENY HEALTH NETWORK. THESE JEFFERSON HOSPITAL-APPOINTED DIRECTORS SERVE AS VOTING MEMBERS ON ALL OF THE FOUNDATION'S COMMITTEES, INCLUDING THE EXECUTIVE, GOVERNANCE, GRANTS AND FINANCE COMMITTEES. AS SUCH THESE JEFFERSON HOSPITAL-APPOINTED DIRECTORS EXERCISE A SIGNIFICANT VOICE IN DETERMINING THE FOUNDATION'S INVESTMENT POLICY, GRANTMAKING GUIDELINES AND AWARDS, AND ALSO PROVIDE FINANCIAL OVERSIGHT. IN ADDITION, THE FOUNDATION ENGAGES IN CONTINUAL COMMUNICATION WITH JEFFERSON HOSPITAL MANAGEMENT.
PART IV, SECTION E, LINE 2A:	THE FOUNDATION SUPPORTS THE MISSION OF JEFFERSON HOSPITAL, PART OF THE ALLEGHENY HEALTH NETWORK, WHOSE EXEMPT PURPOSE INCLUDES IMPROVING THE HEALTH AND WELL-BEING OF THE INDIVIDUALS IN ITS SERVICE AREA, AND THIS PURPOSE IS SUBSTANTIALLY LIKE THE FOUNDATION'S MISSION. THE FOUNDATION'S ACTIVITIES DIRECTLY FURTHER JEFFERSON HOSPITAL'S EXEMPT PURPOSE BY FOCUSING ON PROGRAMS THAT SUPPORT IMPROVING THE HEALTH AND WELL-BEING OF THE COMMUNITY OF JEFFERSON HOSPITAL, AND BUT FOR THE FOUNDATION'S ACTIONS JEFFERSON HOSPITAL WOULD BE REQUIRED TO PROVIDE THIS SUPPORT TO ADDRESS ITS COMMUNITY HEALTH NEEDS. THE FOUNDATION ENSURES THAT IT IS RESPONSIVE TO JEFFERSON HOSPITAL BY REMAINING IN CONTINUAL COMMUNICATION WITH JEFFERSON HOSPITAL MANAGEMENT, INCLUDING THE PRESIDENT AND COO OF JEFFERSON HOSPITAL, THROUGH PARTICIPATION IN JEFFERSON HOSPITAL'S COMMUNITY HEALTH NEEDS ASSESSMENT PROCESS, AND (AS NOTED IN PART IV, SECTION D) WITH THE GUIDANCE OF BOARD MEMBERS SELECTED BY HIGHMARK/ALLEGHENY HEALTH NETWORK. THE FOUNDATION ENSURES THAT ITS DIRECT FURTHERANCE ACTIVITIES CONSTITUTE SUBSTANTIALLY ALL OF ITS ACTIVITIES BECAUSE EVERY GRANT IT CONSIDERS IS REVIEWED BY A GRANTS COMMITTEE WHOSE INTERNAL GUIDELINES REQUIRE IT TO CONSIDER HOW THE GRANTS CONSIDERED ALIGN WITH BOTH THE HOSPITAL'S AND THE FOUNDATION'S MISSIONS. GRANTS THAT DO NOT MEET THIS ALIGNMENT ARE GENERALLY REJECTED.
PART IV, SECTION E, LINE 2B:	PURSUANT TO SECTION 501(R) OF THE INTERNAL REVENUE CODE, JEFFERSON HOSPITAL, AS A REQUIREMENT FOR MAINTAINING ITS TAX-EXEMPT STATUS, MUST DEMONSTRATE THAT IT IS ADEQUATELY ADDRESSING THE HEALTH NEEDS OF THE LOCAL COMMUNITIES IN ITS SERVICE AREA. AS PART OF THIS REQUIREMENT, JEFFERSON HOSPITAL IS REQUIRED TO ENGAGE IN A COMMUNITY HEALTH NEEDS ASSESSMENT (CHNA) AND DEVOTE RESOURCES TO PROJECTS THAT WILL AMELIORATE THE CONCERNS RAISED BY THE CHNA. BY PARTICIPATING IN THE CHNA PROCESS, ENSURING THAT THE FOUNDATION'S PRIORITIES CONTINUE TO ALIGN WITH THOSE OF JEFFERSON HOSPITAL, AND MAINTAINING CONTINUOUS COMMUNICATIONS WITH JEFFERSON HOSPITAL'S MANAGEMENT AND STAKEHOLDERS, THE FOUNDATION ENSURES THAT IT IS WELL VERSED IN THE PRIORITIES JEFFERSON HOSPITAL WISHES TO ADDRESS. THE FOUNDATION CAN THEN LEVERAGE ITS COMMUNITY CONNECTIONS TO HELP IDENTIFY AND PROMOTE ACTIVITIES THAT WILL ADVANCE THE GOALS OF JEFFERSON HOSPITAL AS DOCUMENTED IN THE CHNA, WHILE ALSO PROVIDING THE FINANCIAL RESOURCES THAT JEFFERSON HOSPITAL LACKS TO IMPLEMENT, MONITOR, AND OBJECTIVELY EVALUATE THESE PROGRAMS. JEFFERSON HOSPITAL HAS ACKNOWLEDGED THE FOUNDATION'S EFFORTS BY INCLUDING SEVERAL JEFFERSON REGIONAL FOUNDATION PROJECTS IN ITS IMPLEMENTATION PLAN FOR ITS CHNA. THE MOST RECENT JEFFERSON HOSPITAL/AHN CHNA, WITH IMPLEMENTATION BEGINNING IN 2022, DEMONSTRATES THE CONTINUED ALIGNMENT OF THE FOUNDATION'S MISSION AND PRIORITIES. SEVERAL FOUNDATION GRANTS AND INITIATIVES ARE INCLUDED AS PART OF THE CHNA IMPLEMENTATION PLAN. THESE INCLUDE MENTAL HEALTH OUTREACH, MEDICALLY TAILORED FOOD BOXES, AND THE FRONT DOOR INITIATIVE. MANY OTHER INITIATIVES SUPPORT THESE CHNA GOAL AREAS, A FEW ARE ALSO DETAILED BELOW. IN 2021, THE FOUNDATION CEO WAS INTERVIEWED AS PART OF THE AHN'S CURRENT PROCESS OF UPDATING ITS CHNA. A MAJOR EXAMPLE OF ALIGNMENT IS A GOAL RELATED TO THE COST OF CARE THROUGH ADDRESSING THE SOCIAL DETERMINANTS OF HEALTH. THE FRONT DOOR INITIATIVE IS A \$1 MILLION MULTI-YEAR GRANT, THE LARGEST TO DATE AWARDED TO DATE BY THE FOUNDATION, TO JEFFERSON HOSPITAL OF ALLEGHENY HEALTH NETWORK (AHN) IN 2018. IT SUPPORTS THE DEVELOPMENT OF A MODEL OF EXCELLENCE IN ADDRESSING THE SOCIAL DETERMINANTS OF HEALTH IN ITS EMERGENCY DEPARTMENT. DURING THE ONGOING GRANT PERIOD, AHN HAS CREATED ITS OWN SOCIAL DETERMINANTS OF HEALTH UNIT WHICH STRATEGICALLY SUPPORTS STRATEGIES SUCH AS THE FRONT DOOR INITIATIVE, AND JEFFERSON HOSPITAL HAS DOUBLED ITS EMERGENCY ROOM CAPACITY WITH A STATE-OF-THE-ART FACILITY. THESE CHANGES BOLSTER THE FRONT DOOR PROJECT'S INTENTION TO REDUCE READMISSION RATES AND INCREASE COMMUNITY REFERRALS AND QUALITY OF LIFE THROUGH DATA, TRAININGS, AND THE DEVELOPMENT OF PROMISING PROGRAMS AND THE ENGAGEMENT OF COMMUNITY PARTNERS. THE FRONT DOOR PROGRAM INCLUDES EMERGENCY ROOM SCREENING FOR SOCIAL DETERMINANTS OF HEALTH, REFERRALS TO APPROPRIATE RESOURCES, COMMUNITY HEALTH WORKERS, STAFF TRAINING AND PARTNERSHIPS WITH COMMUNITY-BASED ORGANIZATIONS. THE FOUNDATION HAS BEEN A STRONG PARTNER IN THIS PROJECT AND CONTINUES TO BE REPRESENTED ON AN ADVISORY TEAM. FOR EXAMPLE, THE JEFFERSON HOSPITAL CHNA INCLUDES BEHAVIORAL HEALTH AS A MAJOR AREA OF FOCUS AND A PARTICULAR STRATEGY TO MEASURE OUTREACH OF THE MENTAL HEALTH FIRST AID (MHFA) PROGRAM IN THE AREA. JEFFERSON HOSPITAL'S COMMITMENT TO EXPAND BEHAVIORAL HEALTH SERVICES TO ADOLESCENTS AND ADULTS HAS BEEN SUPPORTED WITH A MULTI-YEAR FOUNDATION GRANT AWARDED IN DECEMBER 2016 (\$180,000) TO BUILD THE UNIT'S STAFFING CAPACITY FOR COMMUNITY EDUCATION, OUTREACH AND PARTNERSHIPS WHICH WOULD STRENGTHEN PREVENTION AND REFERRALS. THE OUTREACH ROLE INCLUDES COORDINATING AN

Return Reference	Explanation
	<p>EVIDENCE-BASED TRAINING PROGRAM CALLED MHFA WHICH HAS SUCCESSFULLY TRAINED NEARLY 1000 COMMUNITY RESIDENTS, AND HOSPITAL AND COMMUNITY-BASED PROFESSIONALS IN THE JEFFERSON AREA OVER SEVERAL YEARS WITH THE TARGETED SUPPORT OF THE FOUNDATION AND ITS NETWORK OF ORGANIZATIONS IN THE JEFFERSON COLLABORATIVE. THE FOUNDATION'S EARLY SUPPORT OF BEHAVIORAL HEALTH EXPANSION HAS MORE RECENTLY LED TO THE DEVELOPMENT AND EXPANSION OF A HIGHLY SUCCESSFUL SCHOOL-BASED BEHAVIORAL HEALTH PROGRAM (CHILL) BASED ON A MINDFULNESS CURRICULUM. THE FOUNDATION HAS ALSO PROVIDED AN ADDITIONAL GRANT FOR PROFESSIONAL EVALUATION OF CHILL TO FURTHER ESTABLISH ITS EFFICACY, VALUE, AND IMPACT. THE JEFFERSON HOSPITAL CHNA HAS A MAJOR FOCUS ON CHRONIC DISEASE. THE FOUNDATION SUPPORTS A PEER-LED COMMUNITY EDUCATION PROGRAM CALLED BETTER HEALTH, BETTER CHOICES TARGETED TO PEOPLE WITH CHRONIC DISEASES. THIS EVIDENCE-BASED PROGRAM DEVELOPED BY STANFORD UNIVERSITY AND EVALUATED LOCALLY BY THE UNIVERSITY OF PITTSBURGH, IS MANAGED IN THE REGION BY VINTAGE, A SENIOR SERVICES AGENCY. THIS PROGRAM HAS BEEN OFFERED AT CHURCHES, LIBRARIES AND THROUGH THE HOSPITAL AND IS EFFECTIVE IN HELPING PATIENTS MANAGE SYMPTOMS, ENGAGE MORE EFFECTIVELY WITH THEIR HEALTH CAREGIVERS, AND IMPROVE THEIR QUALITY OF LIFE. THE JEFFERSON HOSPITAL CHNA WISELY INCLUDES ACCESS TO CARE. A 2018 GRANT FROM THE FOUNDATION TO THE GREATER PITTSBURGH COMMUNITY FOOD BANK PILOTTED THE DISTRIBUTION OF MEDICALLY TAILORED FOOD BOXES TO FOOD INSECURE PATIENTS AT JEFFERSON HOSPITAL HEALTH CENTER AS A TOOL FOR PATIENT RECOVERY AND IMPROVED HEALTH STABILITY. THIS WORK HAS SUPPORTED JEFFERSON/AHN'S PRIORITY AND CREATED A PATHWAY FOR THE CREATION OF THE JEFFERSON HEALTHY FOOD CENTER ONSITE IN 2020. IN ADDITION TO ALIGNMENT WITH THE CHNA, THE FOUNDATION'S RELATIONSHIP WITH JEFFERSON HOSPITAL INCLUDES MANY OTHER RECENT AND ONGOING OPPORTUNITIES FOR EXTENDING OUR JOINT MISSIONS. THIS YEAR, THE FOUNDATION PROVIDED \$20,000 IN GRANT SUPPORT TO A JEFFERSON HOSPITAL/AHN PROGRAM CALLED TALENT ATTRACTION PROGRAM. THE PROGRAM IS DESIGNED TO EXECUTE AN ALLIED HEALTH TRAINING PROGRAM IN COLLABORATION WITH LOCAL EDUCATIONAL PARTNERS WHICH WILL ASSIST DIVERSE STUDENTS IN OVERCOMING IDENTIFIED BARRIERS AND CLEARLY DEFINE A PATHWAY TO BE HIRED INTO ALLIED HEALTH POSITIONS AT JEFFERSON HOSPITAL. BUILDING AND ENGAGING A DIVERSE WORKFORCE IS A PARTICULAR GOAL OF JEFFERSON HOSPITAL AND THE ENTIRE AHN NETWORK AND THIS PROJECT IS EMBRACED AS PART OF A LARGER EFFORT OF THE AHN EQUITABLE HEALTH INSTITUTE. JEFFERSON HOSPITAL/AHN EXPERTS REGULARLY PROVIDE TRAINING AND EDUCATION TO THE FOUNDATION, E.G., DURING THIS YEAR NONPROFIT MEMBERS OF THE FOUNDATION-HOSTED JEFFERSON COLLABORATIVE WERE EDUCATED ON SUBSTANCE ABUSE BY THE MEDICAL DIRECTOR OF AHN'S RECOVERY MEDICINE DEPARTMENT, THE DIRECTOR OF THE CENTER FOR INCLUSION MEDICINE SERVED ON A PANEL AND AHN'S NEW SENIOR VICE-PRESIDENT AND CHIEF CLINICAL DEI OFFICER PRESENTED TO THE FOUNDATION BOARD ON HEALTH EQUITY. WE CONTINUE TO BUILD ON A STRONG HISTORY OF RELATIONSHIPS AND JOINT PROGRAMS BETWEEN THE FOUNDATION AND JEFFERSON HOSPITAL. JEFFERSON HOSPITAL OUTREACH STAFF MEET WITH AND CONSULT WITH FOUNDATION STAFF ON LOCAL ORGANIZATIONS AND PROJECTS. JEFFERSON HOSPITAL WAS ONE OF THE JEFFERSON COUNTS 2020 CENSUS CHAMPIONS IN AN INITIATIVE HOSTED BY THE JEFFERSON REGIONAL FOUNDATION AND JEFFERSON COLLABORATIVE. THE HOSPITAL ENGAGED ALL ITS EMPLOYEES IN CENSUS EDUCATION THROUGH POPULAR DEPARTMENT COMPETITIONS AND RECEIVED EXTENSIVE NEWS COVERAGE FOR ITS PICTURES OF MATERNITY INFANTS WEARING I COUNT ONESIES IN MARCH 2002 AS APRIL 1 CENSUS DAY APPROACHED (SUPPORTED BY A FOUNDATION MINIGRANTS). JEFFERSON HOSPITAL STAFF ATTENDED A FOUNDATION FORUM WORKSHOP ON CULTURAL HUMILITY IN 2019 WHICH SUBSEQUENTLY WAS PILOTTED AT THE HOSPITAL AND THEN EXPANDED AS TRAINING FOR THE ENTIRE HOSPITAL NETWORK IN 2020.</p>

## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

Supplemental Financial Statements

2021

Open to Public Inspection

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.

Department of the Treasury Internal Revenue Service

Name of the organization JEFFERSON REGIONAL FOUNDATION

Employer identification number

56-2420913

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two yes/no questions about donor information.

Part II Conservation Easements.

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

Form for Part II Conservation Easements. Includes checkboxes for types of easements, a table for 'Held at the End of the Year' (2a-2d), and questions about monitoring, expenses, and reporting.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Form for Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Includes questions about reporting art collections and amounts received or held.

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

- 3** Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a**  Public exhibition
  - b**  Scholarly research
  - c**  Preservation for future generations
  - d**  Loan or exchange programs
  - e**  Other .....
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5** During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? . . .  **Yes**  **No**

**Part IV Escrow and Custodial Arrangements.**

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

- 1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . .  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance . . . . .             | <b>1c</b> |
| <b>d</b> Additions during the year . . . . .     | <b>1d</b> |
| <b>e</b> Distributions during the year . . . . . | <b>1e</b> |
| <b>f</b> Ending balance . . . . .                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . .

**Part V Endowment Funds.**

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .					
<b>b</b> Contributions . . . . .					
<b>c</b> Net investment earnings, gains, and losses					
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .					
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .					

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

- a** Board designated or quasi-endowment ▶ .....
- b** Permanent endowment ▶ .....
- c** Term endowment ▶ .....

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

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
<b>(i)</b> Unrelated organizations . . . . .	<b>3a(i)</b>	
<b>(ii)</b> Related organizations . . . . .	<b>3a(ii)</b>	
<b>b</b> If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . .	<b>3b</b>	

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

**Part VI Land, Buildings, and Equipment.**

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements		70,794	45,584	25,210
<b>d</b> Equipment . . . . .		76,734	35,959	40,775
<b>e</b> Other . . . . .				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				65,985

**Part VII Investments - Other Securities.**

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

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives . . . . .		
(2) Closely-held equity interests . . . . .		
(3) Other _____		
(A) OTHER INVESTMENTS	81,295	F
(B) ALTERNATIVE INVESTMENTS	5,370,035	F
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.)	5,451,330	

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col.(B) line 15.)	

**Part X Other Liabilities.**

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col.(B) line 25.)	

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

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

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

<b>1</b>	Total revenue, gains, and other support per audited financial statements . . . . .		<b>1</b>	-15,876,306
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments . . . . .	<b>2a</b>		-24,241,797
<b>b</b>	Donated services and use of facilities . . . . .	<b>2b</b>		
<b>c</b>	Recoveries of prior year grants . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		-319,010
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	-24,560,807
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	8,684,501
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b> :			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	0
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) . . . . .		<b>5</b>	8,684,501

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

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

<b>1</b>	Total expenses and losses per audited financial statements . . . . .		<b>1</b>	3,651,329
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities . . . . .	<b>2a</b>		
<b>b</b>	Prior year adjustments . . . . .	<b>2b</b>		
<b>c</b>	Other losses . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .		<b>2e</b>	0
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .		<b>3</b>	3,651,329
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>		
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>		319,010
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .		<b>4c</b>	319,010
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) . . . . .		<b>5</b>	3,970,339

**Part XIII Supplemental Information**

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

Return Reference	Explanation
PART X, LINE 2:	THE FOUNDATION IS A NOT-FOR-PROFIT CORPORATION AS DESCRIBED IN SECTION 501(C) (3) OF THE INTERNAL REVENUE CODE (THE CODE), AND IS EXEMPT FROM FEDERAL TAXES ON ITS EXEMPT INCOME UNDER SECTION 501(A) OF THE CODE. ACCORDINGLY, NO PROVISION FOR FEDERAL AND STATE INCOME TAXES IS RECORDED. THE FOUNDATION HAS DETERMINED THAT THERE ARE NO MATERIAL UNCERTAIN TAX POSITIONS THAT REQUIRE RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS.
PART XI, LINE 2D - OTHER ADJUSTMENTS:	INVESTMENT MGT. FEES NETTED AGAINST REVENUE ON F/S -319,010.
PART XII, LINE 4B - OTHER ADJUSTMENTS:	INVESTMENT MGT. FEES NETTED AGAINST REVENUE ON F/S 319,010.

## **Additional Data**

[\*\*Return to Form\*\*](#)

**Software ID:**

**Software Version:**

**Schedule I  
(Form 990)**  
  
Department of the  
Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments and Individuals in the United States**  
Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2021**

**Open to Public  
Inspection**

Name of the organization  
JEFFERSON REGIONAL FOUNDATION

**Employer identification number**  
56-2420913

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) ALLEGHENY HEALTH NETWORK FIFTH AVENUE PLACE PITTSBURGH, PA 15222	45-3674924	501(C)(3)	276,000	0	N/A	N/A	ENHANCE RECOVERY MEDICINE SERVICES FOR JEFFERSON RESIDENTS EXPERIENCING SUBSTANCE ABUSE DISORDER AND OPIOID USE DISORDER THROUGH SUPPORT OF SOCIAL WORK, PEER RECOVERY SPECIALISTS AND OTHER SUPPORTIVE STAFF TO ESTABLISH AN ONSITE PROGRAM AT JEFFERSON HOSPITAL BY 2023.
(2) ALLEGHENY HEALTH NETWORK FIFTH AVENUE PLACE PITTSBURGH, PA 15222	45-3674924	501(C)(3)	40,000	0	N/A	N/A	EXECUTE AN ALLIED HEALTH TRAINING PROGRAM IN COLLABORATION WITH LOCAL EDUCATIONAL PARTNERS WHICH WILL ASSIST DIVERSE STUDENTS IN OVERCOMING IDENTIFIED BARRIERS AND CLEARLY DEFINE A PATHWAY TO BE HIRED INTO ALLIED HEALTH POSITIONS AT JEFFERSON HOSPITAL.
(3) AMERICAN RED CROSS			20,000	0	N/A	N/A	INCREASE HOME SAFETY BY PROVIDING FREE SMOKE DETECTORS, FIRE SAFETY AND PREPAREDNESS EDUCATION, AND DIRECT ASSISTANCE TO JEFFERSON FIRE SURVIVORS TO REDUCE INJURY AND DEATH FROM FIRES THROUGH PARTNERSHIPS WITH LOCAL FIRE DEPARTMENTS.
(4) ATTACK THEATRE			44,000	0	N/A	N/A	SUPPORT EDUCATIONAL ENGAGEMENT, PHYSICAL AND MENTAL WELL-BEING, AND SOCIAL EMOTIONAL DEVELOPMENT FOR 600 YOUTH LIVING IN DUQUESNE THROUGH MOVEMENT AND DANCE IN PARTNERSHIP WITH DUQUESNE CITY SCHOOL DISTRICT, BOYS AND GIRLS CLUB OF WESTERN PA, AND THE DUQUESNE FAMILY CENTER.
(5) BEVERLY'S BIRTHDAYS			40,000	0	N/A	N/A	PROVIDE SUPPORT AND OPPORTUNITY TO JEFFERSON WOMEN AND PARENTS/CAREGIVERS EXPERIENCING FINANCIAL HARDSHIP DURING PREGNANCY AND THROUGH THE EARLY YEARS OF A CHILD'S LIFE BY OFFERING 20 GROUP BIRTHDAY PARTIES, 8 COMMUNITY BABY SHOWERS, PROVIDING TANGIBLE ITEMS OF SUPPORT (BABY/BIRTHDAY SUPPLIES AND CLOTHING), AND BUILDING AN AMBASSADOR

							PROGRAM TO GUIDE FUTURE PROGRAMMING.
(6) BHUTANESE COMMUNITY ASSOCIATION OF PITTSBURGH 3000 BROWNSVILLE ROAD SUITE C PITTSBURGH, PA 15227	30-0742370	501(C)(3)	210,000	0	N/A	N/A	STRENGTHEN HEALTHY OPPORTUNITIES AND OPTIONS FOR MEMBERS OF THE LOCAL BHUTANESE COMMUNITY BY BUILDING AND RETAINING STAFF CAPACITY AND MOVING FORWARD WITH A STRATEGIC PLANNING PROCESS.
(7) CASA SAN JOSE			100,000	0	N/A	N/A	INCREASE THE HEALTH AND WELLNESS OF JEFFERSON LATINO INDIVIDUALS/FAMILIES BY EXPANDING EXISTING SERVICES (SERVICE COORDINATION, INTENSIVE CASE MANAGEMENT, EMERGENCY RESPONSE, LEADERSHIP DEVELOPMENT, AND POLICY/ADVOCACY) AND PILOTING A BI-LINGUAL, CULTURALLY SENSITIVE TELEHEALTH MENTAL HEALTH PROGRAM.
(8) COMMUNITY COLLEGE OF ALLEGHENY COUNTY			100,000	0	N/A	N/A	OFFER A HEALTH CAREERS SUMMER PROGRAM THROUGH CCAC SOUTH TO EXPOSE 10TH TO 12TH GRADE STUDENTS FROM LOCAL HIGH SCHOOLS TO THE VARIOUS CAREER OPPORTUNITIES STUDENTS CAN PURSUE THROUGH THE 21 ALLIED HEALTH PROGRAMS OFFERED AT CCAC.
(9) DRESS FOR SUCCESS PITTSBURGH 5001 BAUM BLVD SUITE 55 PITTSBURGH, PA 15213	20-2388089	501(C)(3)	75,000	0	N/A	N/A	INCREASE THE CONFIDENCE AND CAPACITY OF 425 LOCAL FEMALE RESIDENTS PREPARING TO ENTER THE WORKFORCE BY PROVIDING EACH WOMAN WITH APPROPRIATE INTERVIEW CLOTHING, UNIFORM ITEMS, AND CAREER SUPPORT DELIVERED THROUGH A MOBILE BOUTIQUE IN PARTNERSHIP WITH JEFFERSON AREA ORGANIZATIONS.
(10) ESTEEM GROUP INC			10,000	0	N/A	N/A	PROVIDE 350 WEST MIFFLIN AREA MIDDLE SCHOOL STUDENTS (4TH AND 5TH GRADE) WITH SOCIAL AND EMOTIONAL PROGRAMMING.
(11) FIRST STEP RECOVERY HOMES			15,000	0	N/A	N/A	ENHANCE GENERAL OPERATING SUPPORT TO PROVIDE SUPPORT SERVICES TO MEN SUFFERING FROM THE DISEASE OF ADDICTION WITH A HISTORY OF CRIMINAL JUSTICE INVOLVEMENT.
(12) FOOTBRIDGE FOR FAMILIES INC 375 GLADE RUN LANE PITTSBURGH, PA 15238	84-2077025	501(C)(3)	100,000	0	N/A	N/A	ASSIST 3040 JEFFERSON RESIDENTS DURING TIMES OF SHORTTERM FINANCIAL CRISIS AND PROVIDE CONNECTIONS TO ADDITIONAL SUPPORTS THROUGH AN INNOVATIVE TECHNOLOGY PLATFORM WHICH FACILITATES RAPID FINANCIAL RESPONSE TO VENDORS.
(13) GIRL SCOUTS OF WESTERN PENNSYLVANIA			50,000	0	N/A	N/A	BUILD A STRONG SENSE OF SELF AND CONFIDENCE FOR 40 GIRLS IN GRADES 4-6 THROUGH PARTICIPATION IN THE NATIONAL GIRL SCOUTS LEADERSHIP EXPERIENCE WITH STAFF-BASED SUPPORT IN PARTNERSHIP WITH PROPEL HOMESTEAD, PROPEL MCKEESPORT, AND THE DRAGONS DEN.
(14) GLOBAL LINKS 700 TRUMBULL DRIVE PITTSBURGH, PA 15205	52-1629060	501(C)(3)	60,000	0	N/A	N/A	PROVIDE NEEDED SURPLUS MEDICAL SUPPLIES THROUGH PARTNERSHIPS WITH JEFFERSON HUMAN SERVICE

							AGENCIES SERVING OLDER ADULTS AND/OR LOW-INCOME INDIVIDUALS TO INCREASE ORGANIZATIONAL CAPACITY AND TO ENSURE THAT INDIVIDUALS HAVE THE NECESSARY SUPPLIES TO LEAD HEALTHY LIVES AND MAINTAIN THEIR INDEPENDENCE.
(15) HELLO NEIGHBOR			100,000	0	N/A	N/A	INCREASE THE HEALTH AND WELLNESS OF REFUGEE FAMILIES LIVING IN JEFFERSON COMMUNITIES BY SUPPORTING THE LAUNCH OF A NEW, FEDERALLY FUNDED RECEPTION AND PLACEMENT PROGRAM WHICH USES A VOLUNTEER-LED COMMUNITY SPONSORSHIP PROGRAM TO ENGAGE THE BROADER JEFFERSON COMMUNITY IN IMPROVING REFUGEE CULTURAL AND COMMUNITY INTEGRATION THROUGH ASSISTANCE WITH HOUSING, EDUCATION, JOBS, LANGUAGE, AND NAVIGATING AMERICAN SYSTEMS.
(16) HEUER HOUSE			15,000	0	N/A	N/A	SUPPORT THE OPERATION OF THE HEUER HOUSE FOOD PANTRY AND COMMUNITY DISTRIBUTIONS TO JEFFERSON RESIDENTS.
(17) LITERACY PITTSBURGH 411 SEVENTH AVENUE PITTSBURGH, PA 15219	23-1392652	501(C)(3)	150,000	0	N/A	N/A	FOSTER A LIFETIME OF SUCCESS FOR JEFFERSON ADULT LEARNERS BY EXPANDING EMPLOYMENT OPPORTUNITIES THROUGH CAREER PATHWAYS IN CONSTRUCTION AND HEALTHCARE, IMPROVING EMPLOYMENT AND EDUCATIONAL OUTCOMES FOR CARETAKERS AND THEIR CHILDREN, AND IMPARTING VITAL DIGITAL SKILLS.
(18) MAPLE UNIFIED STUDENT ACADEMY (MUSA)			80,000	0	N/A	N/A	EXPAND CAPACITY FOR CONSISTENT, HIGH-QUALITY, LOW-COST PRESCHOOL BASED IN HOMESTEAD FROM 20 TO 37 CHILDREN TO SUPPORT FAMILIES AND INCREASE OVERALL HEALTH AND WELLNESS AND FINANCIAL SUSTAINABILITY.
(19) MELTING POT MINISTRIES 260 ATLANTA DRIVE PITTSBURGH, PA 15228	14-1942636	501(C)(3)	100,000	0	N/A	N/A	SUPPORT POSITIVE DEVELOPMENT FOR YOUTH AND THEIR CAREGIVERS IN SOUTH PARK, BALDWIN-WHITEHALL, AND BETHEL PARK BY PROVIDING AFTERSCHOOL AND SUMMER PROGRAMMING FOCUSED ON EDUCATIONAL, SOCIAL-EMOTIONAL, AND CULTURAL LIFE CHALLENGES.
(20) NEIGHBORHOOD ALLIES (STEEL SMILING)			60,000	0	N/A	N/A	GROW RELATIONSHIPS AND ESTABLISH TRUST WITH COMMUNITY-BASED ENTITIES IN THE SOUTH HILLS AND MON VALLEY COMMUNITIES THROUGH A LISTENING TOUR TO BETTER UNDERSTAND THE SPECIFIC, MENTAL HEALTH NEEDS EXPRESSED BY THE COMMUNITY AND WORK TOWARD EFFECTIVE AND SUSTAINABLE PROGRAMMING.
(21) PENNSYLVANIA WOMEN WORK			150,000	0	N/A	N/A	PREPARE 100 IMMIGRANTS RESIDING IN JEFFERSON COMMUNITIES FOR LIFE-SUSTAINING EMPLOYMENT OPPORTUNITIES BY PROVIDING INSTRUCTION, INDIVIDUALIZED COUNSELING, MENTORSHIP, AND SHORT-TERM TRAINING.

(22) PITTSBURGH URBAN LEADERSHIP SERVICE EXPERIENCE (PULSE)			25,000	0	N/A	N/A	PROVIDE EXPANDED STAFF CAPACITY TO JEFFERSON NONPROFIT ORGANIZATIONS BY SUPPORTING A UNIQUE LEADERSHIP DEVELOPMENT PROGRAM WHICH CULTIVATES A COMMUNITY OF YOUNG SERVANT LEADERS WHO ARE UNIVERSITY GRADUATES TO PARTNER WITH PITTSBURGH NONPROFITS FOR A YEAR OF SERVICE AND LEADERSHIP.
(23) PITTSBURGHERS FOR PUBLIC TRANSIT			40,000	0	N/A	N/A	ASSIST JEFFERSON RESIDENTS IN ACCESSING CRITICAL HEALTH, EDUCATION, AND FOOD SITES BY ORGANIZING TRANSIT RIDERS AND WORKERS TO DEVELOP AND ADVOCATE FOR A STATEWIDE TRANSIT FUNDING SOLUTION.
(24) PUBLICSOURCE			65,000	0	N/A	N/A	INCREASE JEFFERSON ORGANIZATIONS AND RESIDENTS UNDERSTANDING OF CIVIC ENGAGEMENT BY PROVIDING RESOURCES AND SIX EDUCATIONAL WORKSHOPS ON COMMUNITY ENGAGEMENT/STORYTELLING TAUGHT BY EXPERIENCED JOURNALISTS AND DRAW ATTENTION TO THE JEFFERSON AREA BY HIGHLIGHTING 15 STORIES WHICH MAY INCLUDE FIRST-PERSON ESSAYS.
(25) THE BLESSING BOARD			200,000	0	N/A	N/A	INCREASE THE QUALITY OF LIFE AND OVERALL HEALTH AND WELLNESS FOR MORE LOW-INCOME JEFFERSON FAMILIES AND INDIVIDUALS BY SUPPORTING THE OPERATIONS AND SUSTAINABILITY OF A FURNITURE BANK AT A NEW WEST MIFFLIN SITE.
(26) THREE RIVERS WORKFORCE DEVELOPMENT BOARD (PARTNER4WORK)			90,000	0	N/A	N/A	INCREASE WORKFORCE DEVELOPMENT SERVICES IN THE JEFFERSON AREA BY DELIVERING CAREER PROGRAMMING FOR 40 JEFFERSON RESIDENTS LEVERAGING THE PUBLIC WORKFORCE SYSTEM, TRAINING 15 PARTICIPANTS IN OCCUPATIONAL SKILL TRAINING IN THE SOUTH HILLS AND DELIVERING QUARTERLY LABOR MARKET UPDATES TO KEY STAKEHOLDERS.
(27) TRYING TOGETHER 5604 SOLWAY STREET PITTSBURGH, PA 15127	25-6089906	501(C)(3)	75,000	0	N/A	N/A	INCREASE ACCESS OF JEFFERSON AREA LOW-INCOME WORKING PARENTS AND CHILDREN TO QUALITY EARLY CHILDCARE EDUCATION BY PARTNERING WITH LOWER-RATED JEFFERSON CHILDCARE PROVIDERS (BOTH COMMERCIAL AND HOME-BASED) TO INCREASE THEIR STATE STANDARD QUALITY RATING.
(28) VENTURE OUTDOORS 33 TERMINAL WAY PITTSBURGH, PA 15219	20-3275291	501(C)(3)	50,000	0	N/A	N/A	CONTINUE TO ENGAGE JEFFERSON YOUTH AND OLDER ADULTS IN OUTDOOR ACTIVITY THROUGH TARGETED PROGRAMMING PROMOTING HEALTH AND WELLNESS AND OFFER TEENS A MENTORSHIP/ INTERNSHIP PROGRAM TO EXPLORE OUTDOOR CAREERS CALLED THE OUTDOOR INCLUSION COALITION.
(29) VETERANS BREAKFAST CLUB 200 MAGNOLIA PLACE	26-4633657	501(C)(3)	60,000	0	N/A	N/A	SUPPORT LOCAL VETERANS AND THEIR MENTAL HEALTH BY RE-INTRODUCING LOCAL,

PITTSBURGH, PA 15228							IN-PERSON STORYTELLING EVENTS IN THE JEFFERSON AREA (8 IN MCKEESPORT AND 4 IN BETHEL PARK), EXPANDING ONLINE PROGRAMMING, LAUNCHING A NEW MEMBERSHIP MODEL, AND ADDING PART-TIME EVENT STAFF CAPACITY.
(30) VISION TO LEARN			60,000	0	N/A	N/A	INCREASE THE HEALTH AND SCHOOL ENGAGEMENT OF SCHOOLCHILDREN IN JEFFERSON COMMUNITIES IN PARTNERSHIP WITH SCHOOL DISTRICTS (ELIZABETH-FORWARD, WEST MIFFLIN, AND BRENTWOOD) BY OFFERING VISION EXAMS TO 500 STUDENTS AND GLASSES ONSITE TO 400 STUDENTS.
(31) WESTERN PENNSYLVANIA DIAPER BANK			50,000	0	N/A	N/A	IMPROVE THE HEALTH AND WELL-BEING OF JEFFERSON FAMILIES IN NEED BY EXPANDING ACCESS TO FREE DIAPERS AND OTHER ESSENTIALS THROUGH JEFFERSON PARTNER ORGANIZATIONS.
(32) WOMEN FOR A HEALTHY ENVIRONMENT			75,000	0	N/A	N/A	INCREASE AWARENESS OF ENVIRONMENTAL HEALTH FACTORS FOR EMPLOYEES AND FAMILIES IN 24 EARLY CHILDCARE CENTERS, ENGAGE TWO JEFFERSON SCHOOL DISTRICTS IN HEALTHY SCHOOLS RECOGNITION, AND CONDUCT 24 HOME ASSESSMENTS FOR JEFFERSON RESIDENTS/FAMILIES BY PROVIDING TECHNICAL ASSISTANCE ON AN ECO-HEALTHY CHECKLIST AND OFFERING LOW-COST, SUSTAINABLE SOLUTIONS THAT WILL IMPROVE HEALTH OUTCOMES FOR JEFFERSON FAMILIES/CHILDREN.
(33) YOUTHPLACES			100,000	0	N/A	N/A	SUPPORT POSITIVE YOUTH DEVELOPMENT FOR 100 TEENS AGES 12-18 IN MCKEESPORT AND DUQUESNE BY EXPANDING PROGRAM OFFERINGS AND OPENING A NEW LOCATION IN DUQUESNE.
(34) YWCA OF GREATER PITTSBURGH			50,000	0	N/A	N/A	PROVIDE PROGRAM SUPPORT TO 31 JEFFERSON INDIVIDUALS OR FAMILIES FOR HOUSING AND UTILITY ASSISTANCE AND ADVANCE THE PAY EQUITY CAMPAIGN TO IMPROVE WORK CULTURE AND CONDITIONS FOR ALL WOMEN IN THE REGION.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 34  
 3 Enter total number of other organizations listed in the line 1 table 0

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

Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					

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

Return Reference	Explanation
PART I, LINE 2:	<p>MONITORING OF GRANTS BEGINS WITH THE GRANT PROPOSAL PROCESS. APPLICANT ORGANIZATIONS ARE ASKED TO INDICATE GOALS AND MEASURABLE OBJECTIVES WHICH WILL BE ACCOMPLISHED IF THEIR PROGRAM OR PROJECT IS FUNDED. THEY ARE ALSO ASKED TO PROVIDE A NUMBER OF KEY DOCUMENTS WITH THE PROPOSAL, INCLUDING: BOARD LIST, ORGANIZATION BUDGET, MOST RECENT AUDIT, 990 TAX RETURN, STRATEGIC PLAN AND LETTERS OF SUPPORT. TAX-EXEMPT STATUS IS ALSO CHECKED. WHEN A GRANT IS AWARDED, AN ORGANIZATION IS ASKED TO SIGN A LETTER OF AGREEMENT BEFORE THE CHECK AWARD IS ISSUED. THE LETTER LISTS A NUMBER OF JEFFERSON REGIONAL FOUNDATION TERMS AND CONDITIONS, INCLUDING THE NEED TO PROVIDE PROGRESS REPORTS AT SPECIFIC DATES, PRIOR WRITTEN APPROVAL OF ANY SUBSTANTIAL VARIANCES FROM BUDGET OR INTENT, RECORD-KEEPING, AND REQUIRED NOTIFICATIONS. MOST GRANTS REQUIRE A MID-YEAR PROGRESS REPORT AND A YEAR-END PROGRESS REPORT WHICH INDICATE RESULTS ON OBJECTIVES, INFORMATION ABOUT INTENDED AND UNINTENDED RESULTS, CHALLENGES AND A LINE-ITEM FINANCIAL REPORT. STAFF REVIEW THE REPORTS AND CONFER WITH THE APPLICANT IF NEEDED. MULTI-YEAR GRANTS REQUIRE REVIEW OF A REPORT FOR EACH GRANT PERIOD BEFORE BOARD RELEASE OF FUNDING FOR THE NEXT PERIOD. SUMMARIES OF THESE REPORTS ARE PROVIDED TO THE GRANT COMMITTEE FOR DISCUSSION OF THE RESULTS AND ANY RECOMMENDED ACTION. THE COMMITTEE SHARES THE RESULTS AND RECOMMENDATIONS WITH THE BOARD FOR ANY ACTION. IN ADDITION, STAFF BUILD ONGOING RELATIONSHIPS AND MONITOR THROUGHOUT THE GRANT PERIOD THROUGH SITE VISITS, GROUP GRANTEE ORIENTATION SESSION AND TECHNICAL ASSISTANCE. EMERGENCY GRANTS ISSUED TO RESPOND TO COVID-19 IMPACTS AND MINI-GRANTS FOR VARIOUS INITIATIVES HAVE UTILIZED SIMPLIFIED APPLICATION FORMS BUT ALSO COMPLETE THE SAME LETTERS OF AGREEMENT WHICH REQUIRE PROGRESS REPORTS ON BOTH OBJECTIVES AND FINANCIAL STATUS AND ARE REGULARLY MONITORED WITH REPORTS TO THE GRANTS COMMITTEE AND THE BOARD.</p>

**Additional Data**

[Return to Form](#)

**Software ID:**  
**Software Version:**

**Schedule J**  
**(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**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](http://www.irs.gov/Form990) for instructions and the latest information.**

**2021**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization  
JEFFERSON REGIONAL FOUNDATION

Employer identification number

56-2420913

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

<input type="checkbox"/> First-class or charter travel	<input type="checkbox"/> Housing allowance or residence for personal use
<input type="checkbox"/> Travel for companions	<input type="checkbox"/> Payments for business use of personal residence
<input type="checkbox"/> Tax idemnification and gross-up payments	<input type="checkbox"/> Health or social club dues or initiation fees
<input type="checkbox"/> Discretionary spending account	<input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)

**b** If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?

**3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Compensation committee   | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
  - b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
  - c** 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 item in Part III.

**Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
  - b** Any related organization?
- If "Yes," on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
  - b** Any related organization?
- If "Yes," on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
<b>1a</b>		
<b>1b</b>		
<b>2</b>		
<b>4a</b>		No
<b>4b</b>		No
<b>4c</b>		No
<b>5a</b>		No
<b>5b</b>		No
<b>6a</b>		No
<b>6b</b>		No
<b>7</b>		No
<b>8</b>		No
<b>9</b>		



**Part III** **Supplemental Information**

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

Return Reference	Explanation
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## **Additional Data**

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**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 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

**2021****Open to Public  
Inspection**Department of the Treasury  
Internal Revenue ServiceName of the organization  
JEFFERSON REGIONAL FOUNDATION

Employer identification number

56-2420913

Return Reference	Explanation
FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION CONTINUED:	THE FOUNDATION WILL SERVE THE COMMUNITY WITH INTEGRITY AND TRANSPARENCY. ITS SIX NEW PRIORITIES WERE ADOPTED AS PART OF A 2021-2023 STRATEGIC PLAN AND IMPLEMENTED IN JANUARY 2021. THEY INCLUDE: HEALTH AND WELLNESS, CAPACITY BUILDING, CIVIC ENGAGEMENT AND POLICY WORK, DIVERSITY, EQUITY AND INCLUSION, EARLY CHILDHOOD AND YOUTH DEVELOPMENT, AND WORKFORCE AND ECONOMIC OPPORTUNITY.
FORM 990, PART VI, SECTION B, LINE 11B	THE FINAL VERSION OF THE 990 IS PROVIDED TO BOARD MEMBERS FOR REVIEW. INFORMATION AND ITEMS CAN BE CLARIFIED AND CONFIRMED WITH EXECUTIVE MANAGEMENT AND OTHER MEMBERS OF THE BOARD. CORRECTIONS AND CLARIFICATIONS ARE SUBMITTED OR SUGGESTED PRIOR TO THE FILING OF THE RETURN.
FORM 990, PART VI, SECTION B, LINE 12C	PERIODIC REVIEWS ARE CONDUCTED AND MAY INCLUDE ASSISTANCE FROM OUTSIDE ADVISORS TO ENSURE JEFFERSON REGIONAL FOUNDATION IS OPERATING IN A MANNER CONSISTENT WITH ITS CHARITABLE PURPOSE AND DOES NOT ENGAGE IN ACTIVITIES THAT COULD JEOPARDIZE ITS TAX-EXEMPT STATUS. A DISCLOSURE PROCEDURE OUTLINED IN THE CONFLICT OF INTEREST POLICY INCLUDES SUBMISSION OF THE ANNUAL DISCLOSURE STATEMENT AS WELL AS LETTERS, MEMOS, OR OTHER DISCLOSURES TO THE BOARD. THIS PROCEDURE IS MONITORED BY OTHER MEMBERS OF THE BOARD AS WELL AS LEGAL COUNSEL. THE SCOPE OF COVERAGE FOR THE CONFLICT OF INTEREST POLICY IS DIRECTED TOWARDS "POTENTIALLY INTERESTED PARTIES" INCLUDING, BUT NOT LIMITED TO: DIRECTORS, OFFICERS, KEY EMPLOYEES, MEMBERS OF A COMMITTEE WITH BOARD DELEGATED POWERS, PERSONS WHO HAVE AUTHORITY TO ENTER INTO CONTRACTS OR AGREEMENTS, PERSONS WITH ACCESS TO RESTRICTED, SENSITIVE OR CONFIDENTIAL INFORMATION WHICH COULD BE VALUABLE TO NON-JEFFERSON REGIONAL FOUNDATION ENTITIES, AND PERSONS WITH A SIGNIFICANT FINANCIAL INTEREST OR INFLUENTIAL INTEREST. JEFFERSON REGIONAL FOUNDATION PRESIDENT, BY AUTHORITY OF THE BOARD, IS THE DESIGNATED ADMINISTRATOR FOR INTERPRETATION AND IMPLEMENTATION OF THIS POLICY AND ALL PROCEDURES RELATING TO IT. FAILURE TO COMPLY WITH THIS POLICY MAY INCLUDE A DETERMINATION FOR THE POTENTIALLY INTERESTED PARTY TO SEVER ALL TIES WITH JEFFERSON REGIONAL FOUNDATION. THE GOVERNANCE COMMITTEE, AS DOCUMENTED IN ITS CHARTER, HAS ADDITIONAL OVERSIGHT TO DEVELOP AND UPDATE CONFLICT OF INTEREST AND ETHICAL GUIDELINES FOR THE BOARD, PROVIDE BOARD EDUCATION ON THESE MATTERS AND MAKE RECOMMENDATIONS REGARDING UPDATES OR IMPLEMENTATION.
FORM 990, PART VI, SECTION B, LINE 15	THE EXECUTIVE COMMITTEE OF THE BOARD PROVIDES OVERSIGHT OF THE COMPENSATION PROCESS AS IT IS DESIGNATED TO SERVE AS PERSONNEL COMMITTEE. THE COMMITTEE IS LED IN PERSONNEL FUNCTIONS BY THE PRESIDENT OF THE FOUNDATION. AS PART OF ITS ENGAGEMENT WITH THE FOUNDATION, AN OUTSIDE CONSULTING FIRM WHICH SPECIALIZES IN NONPROFIT TALENT MANAGEMENT PROVIDED COMPARABLE COMPENSATION INFORMATION FOR THE FOUNDATION'S KEY COMPENSATED POSITIONS, INCLUDING THE EXECUTIVE DIRECTOR AND DIRECTOR OF GRANTMAKING & STRATEGY. TWO PRIMARY SOURCES ARE USED TO DEVELOP BENCHMARK INFORMATION: A GRANTMAKERS SALARY AND BENEFIT SURVEY COMPILED BY THE COUNCIL ON FOUNDATIONS AND A REGIONAL NONPROFIT SURVEY PUBLISHED BY A LOCAL UNIVERSITY'S NONPROFIT MANAGEMENT PROGRAM. THIS INFORMATION PROVIDES DETAIL ON SALARY RANGES RELATIVE TO THE ASSET SIZE OF SIMILAR ORGANIZATIONS. THE EXECUTIVE COMMITTEE REVIEWS ALL OF THIS INFORMATION IN DETERMINING COMPENSATION, MAKES ITS DETERMINATIONS, AND FULLY REPORTS ITS DELIBERATIONS AND ACTIONS DIRECTLY TO THE BOARD. THE REVIEW AND APPROVAL PROCESS FOR THE DETERMINATION OF COMPENSATION IS DOCUMENTED VIA BOARD AND COMMITTEE MINUTES.
FORM 990, PART VI, SECTION C, LINE 19	THE FORM 990 IS POSTED ON THE FOUNDATION'S WEBSITE. THE FOUNDATION ALSO PRODUCES AN ANNUAL REPORT OF GRANT AWARD INFORMATION WHICH IS DISTRIBUTED IN PRINT FORM AND IS AVAILABLE ON THE FOUNDATION'S WEBSITE. THE CONFLICT OF INTEREST POLICY CAN BE MADE AVAILABLE TO THE PUBLIC UPON REQUEST.

## **Additional Data**

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**SCHEDULE R  
(Form 990)**

**Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047  
**2021**  
**Open to Public Inspection**

- ▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
- ▶ Attach to Form 990.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization  
JEFFERSON REGIONAL FOUNDATION

**Employer identification number**  
56-2420913

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

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)JEFFERSON HOSPITAL P O BOX 18119 COAL VALLEY RD  PITTSBURGH, PA 152360119 25-1260215	HOSPITAL	PA	501(C)(3)	LINE 3	ALLEGHENY HEALTH NETWORK		No

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of- year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K- 1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end- of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No

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

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

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a** Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity . . . . .
- b** Gift, grant, or capital contribution to related organization(s) . . . . .
- c** Gift, grant, or capital contribution from related organization(s) . . . . .
- d** Loans or loan guarantees to or for related organization(s) . . . . .
- e** Loans or loan guarantees by related organization(s) . . . . .
- f** Dividends from related organization(s) . . . . .
- g** Sale of assets to related organization(s) . . . . .
- h** Purchase of assets from related organization(s) . . . . .
- i** Exchange of assets with related organization(s) . . . . .
- j** Lease of facilities, equipment, or other assets to related organization(s) . . . . .
- k** Lease of facilities, equipment, or other assets from related organization(s) . . . . .
- l** Performance of services or membership or fundraising solicitations for related organization(s)
- m** Performance of services or membership or fundraising solicitations by related organization(s) . . . . .
- n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .
- o** Sharing of paid employees with related organization(s) . . . . .
- p** Reimbursement paid to related organization(s) for expenses . . . . .
- q** Reimbursement paid by related organization(s) for expenses . . . . .
- r** Other transfer of cash or property to related organization(s) . . . . .
- s** Other transfer of cash or property from related organization(s) . . . . .

	Yes	No
<b>1a</b>		No
<b>1b</b>	Yes	
<b>1c</b>		No
<b>1d</b>		No
<b>1e</b>		No
<b>1f</b>		No
<b>1g</b>		No
<b>1h</b>		No
<b>1i</b>		No
<b>1j</b>		No
<b>1k</b>	Yes	
<b>1l</b>	Yes	
<b>1m</b>		No
<b>1n</b>	Yes	
<b>1o</b>		No
<b>1p</b>	Yes	
<b>1q</b>		No
<b>1r</b>		No
<b>1s</b>		No

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

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



**Part VII Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

Return Reference

Explanation

Schedule R (Form 990) 2021

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