

990

Return of Organization Exempt From Income Tax

OMB No. 1545-

0047 2022

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.

Department of the Treasury Internal Revenue Service

A For the 2022 calendar year, or tax year beginning 07-01-2022, and ending 06-30-2023

- 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 \$ 26,616,810

F Name and address of principal officer: RICHARD TALARICO, 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. H(c) Group exemption number

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

J Website: WWW.JEFFERSONRF.ORG

K Form of organization: Corporation, Trust, Association, Other

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

Part I Summary

Table with 4 main sections: Activities & Governance, Revenue, Expenses, Net Assets or Fund Balances. Includes rows for mission statement, voting members, revenue, expenses, and net assets.

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.

Sign Here: Signature of officer TRISHA GADSON CEO, Date 2023-12-20

Paid Preparer Use Only: Print/Type preparer's name, Preparer's signature, Date 2023-12-13, Firm's name BAKER TILLY US LLP, Firm's address 1570 FRUITVILLE PIKE SUITE 400 LANCASTER, PA 17601

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 \$ 970,000 including grants of \$ 970,000) (Revenue \$ 0)

IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO IMPROVE HEALTH AND WELLNESS, THE FOUNDATION MADE THE FOLLOWING GRANTS: - THE MON VALLEY INITIATIVE, OPERATING SUPPORT TO ADDRESS SOCIAL DETERMINANTS OF HEALTH:PROVIDE GENERAL OPERATIONAL SUPPORT TO STRENGTHEN MVI'S ABILITY TO OFFER HEALTHY OPPORTUNITIES AND ADDRESS THE SOCIAL DETERMINANTS OF HEALTH FOR MON VALLEY RESIDENTS WHICH INCLUDE SERVICES RELATED TO HOUSING, EDUCATION, FINANCIAL LITERACY, AND WORKFORCE DEVELOPMENT. (\$175,000)CONTINUED ON SCHEDULE O.- SOUTHWESTERN PA PARTNERSHIP FOR AGING, AGE FRIENDLY GREATER PITTSBURGH:IMPROVE HEALTH AND WELL-BEING FOR JEFFERSON OLDER ADULTS BY INCREASING ACCESS TO RESOURCES IN NEIGHBORHOODS, STRENGTHENING INTERGENERATIONAL CONNECTIONS TO REDUCE ISOLATION AND LONELINESS, AND CHAMPIONING NEW IDEAS THROUGH A COLLABORATIVE EFFORT. (\$125,000)- WOMEN FOR A HEALTHY ENVIRONMENT, STRENGTHENING AND SUSTAINING HEALTHY SPACES:INCREASE AWARENESS OF ENVIRONMENTAL HEALTH FACTORS FOR EMPLOYEES AND FAMILIES IN 20 EARLY CHILDCARE CENTERS AND CONDUCT 40 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. (\$125,000)- BOROUGH OF BALDWIN (BOROUGH OF BALDWIN POLICE DEPARTMENT), INCREASED RESPONSE TO SUDDEN CARDIAC ARRESTINCREASE THE OPPORTUNITY TO SAVE JEFFERSON RESIDENTS LIVES FROM SUDDEN CARDIAC ARREST THROUGH THE PURCHASE OF 44 AUTOMATED EXTERNAL DEFIBRILLATORS (AED) TO BE INSTALLED IN POLICE PATROL VEHICLES SERVING BALDWIN BOROUGH, PLEASANT HILLS BOROUGH, AND WEST MIFFLIN BOROUGH. (\$100,000)- MCKEES POINT DEVELOPMENT GROUP, ADDRESSING COMMUNITY VIOLENCE:DECREASE COMMUNITY VIOLENCE IN MCKEESPORT BY SUPPORTING CONVENINGS AND COMMUNITY BUILDING EVENTS TO ENGAGE RESIDENTS IN ANTI-VIOLENCE EDUCATIONAL PROGRAMMING, FACILITATED COMMUNITY IMPROVEMENT DISCUSSIONS AND COMMUNITY-LED YOUTH PROGRAMMING. (\$75,000)- THE BLESSING BOARD, SOUTH SHOWROOM: WEST MIFFLIN LOCATION:INCREASE THE QUALITY OF LIFE AND OVERALL HEALTH AND WELLNESS FOR FAMILIES AND INDIVIDUALS EXPERIENCING LOW-INCOME STATUS LIVING IN THE JEFFERSON REGIONAL SERVICE AREA BY SUPPORTING THE OPERATIONS AND SUSTAINABILITY OF A FURNITURE/DURABLE MEDICAL EQUIPMENT BANK IN WEST MIFFLIN. (\$75,000)- DUQUESNE UNIVERSITY, BRIDGES TO HEALTH FOR THE MON VALLEY:INCREASE OVERALL HEALTH AND WELLNESS FOR MON VALLEY RESIDENTS BY WORKING TO ADDRESS HEALTH DISPARITIES AND COMMUNITY-IDENTIFIED HEALTH PRIORITIES, WITH A FOCUS ON ASTHMA, CARDIOVASCULAR DISEASE, DIABETES, MENTAL HEALTH, AND SOCIAL DETERMINANTS OF HEALTH. (\$60,000)- FOOTBRIDGE FOR FAMILIES, INC., RAPID RESPONSE FUNDING TO SUPPORT JEFFERSON FAMILIES:ASSIST 15-30 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. (\$60,000)- VENTURE OUTDOORS, OUTDOORS FOR ALL:CONTINUE TO ENGAGE JEFFERSON YOUTH, MENTORS, AND VOLUNTEERS IN OUTDOOR ACTIVITY THROUGH TARGETED PROGRAMMING PROMOTING HEALTH AND WELLNESS AND OFFER TEENS A MENTORSHIP/INTERNSHIP PROGRAM TO EXPLORE OUTDOOR CAREERS. (\$50,000)- ALLEGHENY HEALTH NETWORK, CHILL PROJECT IN CLAIRTON: COMMUNITY-BASED YOUTH BEHAVIORAL HEALTH:IMPROVE LONG-TERM AND SUSTAINABLE BEHAVIORAL HEALTH OUTCOMES OF CLAIRTON SCHOOL DISTRICT STUDENTS AND EDUCATORS BY SUPPORTING THE THIRD YEAR OF A COLLABORATIVE MODEL/PILOT WITH AHN AND AWAKEN PITTSBURGH. (\$45,000)- PA CLEANWAYS OF ALLEGHENY COUNTY, INC. D.B.A ALLEGHENY CLEANWAYS, ELIMINATING ILLEGAL TRASH DUMPING TO INCREASE PUBLIC HEALTH:ENGAGE AND EMPOWER RESIDENTS OF MCKEESPORT TO ELIMINATE ILLEGAL DUMPING BY PARTICIPATING IN COMMUNITY CLEANING OF ILLEGAL DUMPSTITES AND ASSESS ILLEGAL DUMPING FOR CLAIRTON, WEST MIFFLIN, AND ELIZABETH TOWNSHIP, AND FORWARD TOWNSHIP. (\$30,000)- AMERICAN NATIONAL RED CROSS, HOME FIRE RELIEF:INCREASE HEALTH, WELL-BEING, AND HOME SAFETY BY PROVIDING DIRECT ASSISTANCE, FIRE SAFETY AND PREPAREDNESS EDUCATION, AND SMOKE ALARMS TO JEFFERSON INDIVIDUALS/FAMILIES TO REDUCE INJURY AND DEATH FROM FIRES THROUGH PARTNERSHIPS WITH LOCAL FIRE DEPARTMENTS. (\$25,000)- ANSAR OF PITTSBURGH, MENTAL HEALTH AND WELLNESS INITIATIVE:SUPPORT THE MENTAL HEALTH AND WELLNESS OF REFUGEES LIVING IN DUQUESNE THROUGH INCREASED ACCESS TO RESOURCES TO FOSTER GOOD MENTAL HEALTH PRACTICES AND SELF-EXPRESSION. (\$25,000)

4b (Code:) (Expenses \$ 551,000 including grants of \$ 551,000) (Revenue \$ 0)

IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO INCREASE CHILD AND FAMILY OUTCOMES, THE FOUNDATION MADE THE FOLLOWING GRANTS:- MELTING POT MINISTRIES, YOUTH AND FAMILY SUPPORT: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. (\$150,000)CONTINUED ON SCHEDULE O.- DRAGON'S DEN, OUT-OF-SCHOOL TIME YOUTH PROGRAMMING:BUILD SELF-CONFIDENCE, TRUST, AND SOCIABILITY OF JEFFERSON SCHOOL-AGE YOUTH AND DEVELOP DEEPER COMMUNITY ENGAGEMENT IN HOMESTEAD BY OFFERING AFTER SCHOOL PROGRAMS, SUMMER CAMPS, AND INTRODUCING COMMUNITY WORKSHOPS/EVENTS USING THE CHALLENGE COURSE AND ZIP LINE IN THE HISTORIC ST. MARY MAGDALENE CHURCH. (\$120,000)- UNITED WAY OF SOUTHWESTERN PENNSYLVANIA, WELCOME BACK SUMMER 2023:PROVIDE IN-PERSON SUMMER PROGRAMMING WITH HANDS-ON AND SOCIAL AND EMOTIONAL LEARNING OPPORTUNITIES FOR YOUTH IN KINDERGARTEN THROUGH HIGH SCHOOL BY MANAGING AND IMPLEMENTING A COLLABORATIVE FUNDING MODEL. (\$85,000)- STOREHOUSE FOR TEACHERS D.B.A THE EDUCATION PARTNERSHIP, PROVIDING ESSENTIAL SCHOOL SUPPLIES TO PROMOTE LEARNING:IMPROVE THE LONG-TERM OVERALL HEALTH AND WELL-BEING AND EDUCATIONAL OUTCOMES OF STUDENTS ATTENDING CLAIRTON MIDDLE/HIGH SCHOOL, DUQUESNE ELEMENTARY SCHOOL, FOUNDERS' HALL MIDDLE SCHOOL (MCKEESPORT), AND TWIN RIVERS ELEMENTARY SCHOOL (MCKEESPORT) BY PROVIDING EACH STUDENT WITH INDIVIDUAL SCHOOL SUPPLIES AND PROVIDING TEACHERS ACCESS TO THE TEACHER RESOURCE CENTER FOR SUPPLIES AND EQUIPMENT. (\$70,000)- BEVERLY'S BIRTHDAYS, CHAMPIONING SOCIAL/EMOTIONAL YOUTH DEVELOPMENT: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 GROUP BIRTHDAY PARTIES, COMMUNITY BABY SHOWERS, PROVIDING TANGIBLE ITEMS OF SUPPORT (BABY/BIRTHDAY SUPPLIES AND CLOTHING), AND PROVIDING ACCESS TO THE NEWLY FORMED GREATER PITTSBURGH INFANT FORMULA BANK. (\$50,000)- YOUNG PEOPLE IN RECOVERY, BUILDING SAFE RECOVERY NETWORKS FOR YOUNG PEOPLE:IMPROVE ACCESS TO A PEER-RECOVERY NETWORK, TREATMENT, EDUCATION, HOUSING, AND EMPLOYMENT FOR JEFFERSON YOUNG PEOPLE IN SUBSTANCE ABUSE RECOVERY THROUGH LAUNCHING A PEER-LED CHAPTER TO CONDUCT PRO-SOCIAL ACTIVITIES, ALL-RECOVERY MEETINGS, AND LIFE SKILL WORKSHOPS IN THE JEFFERSON AREA. (\$42,000)- CITIZEN SCIENCE LAB, STEM PROGRAMMING FOR JEFFERSON YOUNG PEOPLE: INCREASE THE NUMBER OF STUDENTS OF COLOR INTERESTED IN SCIENCE, TECHNOLOGY ENGINEERING AND MATH (STEM) BY PROVIDING 10 INTERACTIVE STEM WORKSHOPS FOR 100 YOUNG PEOPLE PARTICIPATING IN OUT-OF-SCHOOL TIME PROGRAMS AT DRAGON'S DEN, SHIM, AND YOUTHPLACES. (\$34,000)

4c (Code:) (Expenses \$ 395,000 including grants of \$ 395,000) (Revenue \$ 0)

IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO STRENGTHEN THE WORKFORCE, THE FOUNDATION MADE GRANTS TOTALING \$175,000 AS FOLLOWS:- THE MON VALLEY INITIATIVE,WORKFORCE DEVELOPMENT AND FINANCIAL COACHING:ASSIST UNEMPLOYED AND UNDER-EMPLOYED JEFFERSON RESIDENTS IN ACHIEVING THEIR GOALS OF FINANCIAL SELF- SUFFICIENCY THROUGH OFFERING A COMPREHENSIVE WORKFORCE DEVELOPMENT PROGRAM. CONTINUED ON SCHEDULE O.IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO INCREASE CIVIC ENGAGEMENT, THE FOUNDATION MADE \$150,000 IN GRANTS AS FOLLOWS:- BLACK WOMEN'S POLICY CENTER, INC., BUILDING CIVIC ENGAGEMENT POWER FOR BLACK WOMEN:IMPROVE THE HEALTH AND WELLNESS OF BLACK WOMEN LIVING IN MCKEESPORT, DUQUESNE, CLAIRTON, WEST MIFFLIN AND HOMESTEAD AND SHARE THEIR LIVED EXPERIENCE BY OFFERING SUPPORT AND COACHING THROUGH SYSTEM NAVIGATION, CONNECTION TO RESOURCES, ADVOCACY ON SHAPING PUBLIC POLICY, AND TRAINING AND EDUCATION.IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO STRENGTHEN DIVERSITY, EQUALITY, AND INCLUSION, THE FOUNDATION MADE \$70,000 IN GRANTS AS FOLLOWS: - MELANIN MOMMIES PITTSBURGH, H.E.A.L. TOGETHER, MENTAL HEALTH CIRCLE FOR BLACK WOMEN AND MOTHERS: ASSIST 50 BLACK MOTHERS AND WOMEN LIVING IN THE MON VALLEY COMMUNITIES OF MCKEESPORT, DUQUESNE, AND HOMESTEAD WHO HAVE EXPERIENCED THE IMPACTS OF GUN VIOLENCE IN THEIR HEALING JOURNEY BY PROVIDING FREE, ACCESSIBLE, AND STIGMA-FREE THERAPY AND GRIEF COUNSELING. (\$40,000)- ANNA MIDDLETON WAITE LEARNING CENTER, PROVIDING DIGITAL EQUITY FOR OLDER ADULTS:PROVIDE OLDER ADULTS THE NECESSARY TOOLS TO ENGAGE IN THE DIGITAL WORLD BY PROVIDING PERSONAL COMPUTERS, WI-FI ACCESS, TECHNICAL SUPPORT, AND TRAINING. (\$30,000)

(Code:) (Expenses \$ 255,000 including grants of \$ 255,000) (Revenue \$ 0)

IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO STRENGTHEN THE WORKFORCE, THE FOUNDATION MADE GRANTS TOTALING \$175,000 AS FOLLOWS: - THE MON VALLEY INITIATIVE, WORKFORCE DEVELOPMENT AND FINANCIAL COACHING:ASSIST UNEMPLOYED AND UNDER-EMPLOYED JEFFERSON RESIDENTS IN ACHIEVING THEIR GOALS OF FINANCIAL SELF- SUFFICIENCY THROUGH OFFERING A COMPREHENSIVE WORKFORCE DEVELOPMENT PROGRAM. IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO INCREASE CIVIC ENGAGEMENT, THE FOUNDATION MADE \$150,000 IN GRANTS AS FOLLOWS: - BLACK

WOMEN'S POLICY CENTER, INC., BUILDING CIVIC ENGAGEMENT POWER FOR BLACK WOMEN:IMPROVE THE HEALTH AND WELLNESS OF BLACK WOMEN LIVING IN MCKEESPORT, DUQUESNE, CLAIRTON, WEST MIFFLIN AND HOMESTEAD AND SHARE THEIR LIVED EXPERIENCE BY OFFERING SUPPORT AND COACHING THROUGH SYSTEM NAVIGATION, CONNECTION TO RESOURCES, ADVOCACY ON SHAPING PUBLIC POLICY, AND TRAINING AND EDUCATION.IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO STRENGTHEN DIVERSITY, EQUALITY, AND INCLUSION, THE FOUNDATION MADE \$70,000 IN GRANTS AS FOLLOWS: - MELANIN MOMMIES PITTSBURGH, H.E.A.L. TOGETHER, MENTAL HEALTH CIRCLE FOR BLACK WOMEN AND MOTHERS: ASSIST 50 BLACK MOTHERS AND WOMEN LIVING IN THE MON VALLEY COMMUNITIES OF MCKEESPORT, DUQUESNE, AND HOMESTEAD WHO HAVE EXPERIENCED THE IMPACTS OF GUN VIOLENCE IN THEIR HEALING JOURNEY BY PROVIDING FREE, ACCESSIBLE, AND STIGMA-FREE THERAPY AND GRIEF COUNSELING. (\$40,000)- ANNA MIDDLETON WAITE LEARNING CENTER, PROVIDING DIGITAL EQUITY FOR OLDER ADULTS:PROVIDE OLDER ADULTS THE NECESSARY TOOLS TO ENGAGE IN THE DIGITAL WORLD BY PROVIDING PERSONAL COMPUTERS, WI-FI ACCESS, TECHNICAL SUPPORT, AND TRAINING. (\$30,000)IN SUPPORT OF THE RECOGNIZED COMMUNITY HEALTH NEED TO IMPROVE CAPACITY-BUILDING, THE FOUNDATION MADE THE FOLLOWING GRANTS: - FOOTBRIDGE FOR FAMILIES, INC., TECHNOLOGY CAPACITY-BUILDING:PROVIDE OPERATIONAL ASSISTANCE BECAUSE OF ACCELERATED GROWTH OF THIS NONPROFIT DUE TO CONTINUOUS SUPPORT OFFERED TO FAMILIES IN LOW SOCIOECONOMIC COMMUNITIES. OPERATIONAL ASSISTANCE IS NEEDED IN BUILDING THE TECHNOLOGY CAPACITY TO SERVE JEFFERSON RESIDENTS. UPDATING THE TECHNOLOGY PLATFORM WHICH FACILITATES RAPID FINANCIAL RESPONSE TO VENDORS ON BEHALF OF FAMILIES IS CRITICAL TO THE SUPPORT OF FAMILIES. (\$65,000)- OPERATION TROOP APPRECIATION, CAPACITY-BUILDING FOR NEW SPACE:PROVIDE CAPACITY-BUILDING SUPPORT FOR COSTS ASSOCIATED WITH A TRANSITION TO A NEW BUILDING TO INCREASE THE HEALTH AND WELL-BEING OF THE VETERAN COMMUNITY LIVING AT OR BELOW THE POVERTY LINE. (\$60,000)- VENTURES IN PEOPLE, CAPITAL IMPROVEMENT FOR EARLY LITERACY AND CAPACITY-BUILDING:PROVIDE CAPITAL SUPPORT FOR COSTS ASSOCIATED WITH A NEW ROOF TO ENSURE THE HEALTH AND WELL-BEING OF 30 CHILDREN AND FAMILIES ATTENDING EARLY HEAD START PROGRAMMING AND ENABLE FUTURE COMMUNITY OFFERINGS. (\$45,000)- YOUTH OPPORTUNITIES DEVELOPMENT, CAPACITY-BUILDING FOR NEW SPACE:PROVIDE CAPACITY-BUILDING SUPPORT FOR COSTS ASSOCIATED WITH A TRANSITION TO NEW SPACE TO PROVIDE OUT-OF-SCHOOL TIME PROGRAMMING FOR CLAIRTON YOUTH IN PARTNERSHIP WITH CLAIRTON CITY SCHOOL DISTRICT. (\$45,000)- FILIPINO AMERICAN ASSOCIATION OF PITTSBURGH, CAPACITY BUILDING FOR EXPANSION OF PROGRAMMING:PROVIDE CAPACITY-BUILDING SUPPORT THROUGH AN ORGANIZATIONAL ASSESSMENT IN PARTNERSHIP WITH A CONSULTANT AND ASSIST THE FAAP IN EXPANDING SERVICES AND INCREASING HEALTH AND WELL-BEING IN THE LOCAL FILIPINO COMMUNITY. (\$30,000)- BLACK WOMEN'S POLICY CENTER, INC., SUPPORTING CAPACITY FOR COMMUNITY ENGAGEMENT:SECURE A NEW LOCATION FOR THE BLACK WOMEN'S POLICY CENTER TO CONTINUE ITS COMMUNITY DEVELOPMENT WORK. (\$10,000)

(Code:) (Expenses \$ 1,273,644 including grants of \$ 459,250) (Revenue \$ 0)

NEW STRATEGIC PLAN: AT IT'S 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.THE FIVE STRATEGIC GOALS INCLUDE:1. INVEST THROUGH GRANT-MAKING AND COMMUNITY ENGAGEMENT STRATEGIES IN SIX NEW PRIORITIES2. 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.

4d	Other program services (Describe in Schedule O.)	(Expenses \$ 1,528,644 including grants of \$ 714,250)	(Revenue \$ 0)
4e	Total program service expenses	3,444,644	

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)

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 22 through 38 regarding tax-exempt bond issues, excess benefit transactions, and related party transactions.

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

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 1a, 1b, and 1c regarding Form 1096, Forms W-2G, and gaming winnings.

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

Main form content with questions 2a through 17 and corresponding answer boxes (2a-17).

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... 2 Did any officer, director, trustee... 3 Did the organization delegate control... 4 Did the organization make any significant changes... 5 Did the organization become aware... 6 Did the organization have members... 7a Did the organization have members... 7b Are any governance decisions... 8 Did the organization contemporaneously document... 8a The governing body? 8b Each committee... 9 Is there any officer, director, trustee, or key employee listed in Part VII...

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... 10b If "Yes," did the organization have written policies... 11a Has the organization provided a complete copy... 11b Describe on Schedule O the process... 12a Did the organization have a written conflict of interest policy... 12b Were officers, directors, or trustees... 12c Did the organization regularly and consistently monitor... 13 Did the organization have a written whistleblower policy... 14 Did the organization have a written document retention... 15 Did the process for determining compensation... 15a The organization's CEO... 15b Other officers or key employees... 16a Did the organization invest in, contribute assets to... 16b If "Yes," did the organization follow a written policy...

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... 19 Describe in Schedule O whether (and if so, how) the organization made its governing documents... 20 State the name, address, and telephone number of the person who possesses the organization's books and records: TRISHA GADSON CEO 470 STREETS RUN ROAD SUITE 301 PITTSBURGH, PA 15236 (412) 990-7112

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, box 6 of 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) VIRGINIA WEIDA TREASURER	2.00	X		X				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) DR MARK P GANNON DIRECTOR	1.00	X						0	0	0
(10) DANIEL A ONORATO DIRECTOR	1.00	X						0	0	0
(11) FRANCES SMITH ROHRICH DIRECTOR	1.00	X						0	0	0
(12) DR TIFFANY EVANS DIRECTOR	1.00	X						0	0	0
(13) HELEN FALLON DIRECTOR	1.00	X						0	0	0
(14) CAITLIN GREEN DIRECTOR	1.00	X						0	0	0
(15) ERIN ICKES DIRECTOR	1.00	X						0	0	0
(16) JO DEBOLT DIRECTOR	1.00	X						0	0	0
(17) DR MANZOOR MOHIDEEN DIRECTOR	1.00	X						0	0	0

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(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			
(18) KENYA BOSWELL DIRECTOR	1.00	X					0	0	0
(19) THOMAS KAVANAUGH DIRECTOR	1.00	X					0	0	0
(20) TRISHA GADSON CHIEF EXECUTIVE OFFICER (AS OF 9/22)	40.00			X			47,106	0	6,909
(21) MARY PHAN-GRUBER CHIEF EXECUTIVE OFFICER (UNTIL 9/22)	40.00			X			158,684	0	7,159
(22) KELLIE BOLAND DIRGRANTMAKING & STRATEGY	40.00					X	103,224	0	31,093
(23) CHARLES MODISPACHER FORMER PRESIDENT	0.00					X	25,000	0	0
1b Sub-Total									
c Total from continuation sheets to Part VII, Section A									
d Total (add lines 1b and 1c)						334,014	0	45,161	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ **2**

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3 Yes	
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4 Yes	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ **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 Similar Amounts				
1a Federated campaigns		1a		
b Membership dues		1b		
c Fundraising events		1c		
d Related organizations		1d		
e Government grants (contributions)		1e		
f All other contributions, gifts, grants, and similar amounts not included above		1f		
g Noncash contributions included in lines 1a - 1f:\$		1g		
h Total. Add lines 1a-1f				

Program Service Revenue		Business Code			
2a					
b					
c					
d					
e					
f	All other program service revenue.				
g Total.	Add lines 2a-2f.				

3	Investment income (including dividends, interest, and other similar amounts)		2,073,385			2,073,385
4	Income from investment of tax-exempt bond proceeds					
5	Royalties					
6a	Gross rents	(i) Real	(ii) Personal			
b	Less: rental expenses	6b				
c	Rental income or (loss)	6c				
d	Net rental income or (loss)					
7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
b	Less: cost or other basis and sales expenses	7b		24,543,425		
c	Gain or (loss)	7c		22,415,839		
d	Net gain or (loss)			2,127,586		2,127,586
8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	8a				
b	Less: direct expenses	8b				
c	Net income or (loss) from fundraising events					
9a	Gross income from gaming activities. See Part IV, line 19	9a				
b	Less: direct expenses	9b				
c	Net income or (loss) from gaming activities					
10a	Gross sales of inventory, less returns and allowances	10a				
b	Less: cost of goods sold	10b				
c	Net income or (loss) from sales of inventory					

Other Revenue		Business Code				
11a						
b						
c						
d	All other revenue					
e Total.	Add lines 11a-11d					
12 Total revenue.	See instructions		4,200,971	0	0	4,200,971

OtherRevenueMiscAmt

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
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,630,250	2,630,250		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	151,183	98,094	53,089	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	348,355	285,177	63,178	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	13,580	11,042	2,538	
9 Other employee benefits	69,226	54,906	14,320	
10 Payroll taxes	36,838	28,417	8,421	
11 Fees for services (non-employees):				
a Management				
b Legal	19,015	10,458	8,557	
c Accounting	28,946	15,920	13,026	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	217,200		217,200	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	73,434	40,389	33,045	
12 Advertising and promotion				
13 Office expenses	43,385	32,973	10,412	
14 Information technology	47,276	37,821	9,455	
15 Royalties				
16 Occupancy	99,414	75,555	23,859	
17 Travel	374	299	75	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	25,949	19,721	6,228	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	21,096		21,096	
23 Insurance	9,959	7,569	2,390	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a PROGRAM INITIATIVES	71,072	71,072		
b STAFF & BOARD DEVELOPME	13,190	10,025	3,165	
c DUES & MEMBERSHIPS	12,691	9,645	3,046	
d REPAIRS & MAINTENANCE	5,576	4,238	1,338	
e All other expenses	2,138	1,073	1,065	
25 Total functional expenses. Add lines 1 through 24e	3,940,147	3,444,644	495,503	0
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <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
Assets	1 Cash-non-interest-bearing		1	
	2 Savings and temporary cash investments	300,266	2	614,099
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	
	5 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		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	60,759	9	32,772
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 222,005		
	b Less: accumulated depreciation	10b 102,639	65,985	10c 119,366
	11 Investments—publicly traded securities	99,734,597	11	107,116,794
	12 Investments—other securities. See Part IV, line 11	5,451,330	12	5,273,180
	13 Investments—program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	8,285	15	797,521
16 Total assets: Add lines 1 through 15 (must equal line 33)	105,621,222	16	113,953,732	
Liabilities	17 Accounts payable and accrued expenses	85,715	17	56,327
	18 Grants payable	799,000	18	459,000
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 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		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D	0	25	789,236
	26 Total liabilities. Add lines 17 through 25	884,715	26	1,304,563
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	104,736,507	27	112,649,169
	28 Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	104,736,507	32	112,649,169
33 Total liabilities and net assets/fund balances	105,621,222	33	113,953,732	

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,200,971
2	Total expenses (must equal Part IX, column (A), line 25)	2	3,940,147
3	Revenue less expenses. Subtract line 2 from line 1	3	260,824
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	104,736,507
5	Net unrealized gains (losses) on investments	5	7,651,838
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (A))	10	112,649,169

Part XII Financial Statements and Reporting

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

		Yes	No
1	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.		
2a	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	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	
c	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	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		No
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

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.

OMB No. 1545-0047
2022
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 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).** (Attach Schedule E (Form 990).)
- 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).** Enter the hospital's name, city, and state:
- 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).** (Complete Part II.)
- 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).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 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. See instructions. Enter the name, city, and state of the college or university:
- 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—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 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).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - 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. **You must complete Part IV, Sections A and B.**
 - 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). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - 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).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A) JEFFERSON HOSPITAL	251260215	3	Yes		20,000	0
Total					20,000	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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . .						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4.						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) **12**

13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f) divided by line 11, column (f))	14	
15 Public support percentage for 2020 Schedule A, Part II, line 14	15	

16a 33 1/3% support test—2022. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

b 33 1/3% support test—2021. 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 **stop here.** The organization qualifies as a publicly supported organization

17a 10%-facts-and-circumstances test—2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

b 10%-facts-and-circumstances test—2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

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

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) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2 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						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
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.						
c Add lines 7a and 7b. .						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from 2021 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2022. 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 <input type="checkbox"/>		
b 33 1/3% support tests—2021. 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 <input type="checkbox"/>		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions <input type="checkbox"/>		

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
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		No
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		No
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		No
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		No
b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (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 Part VI .		No
7	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).		No
8	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).		No
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		No
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 Part VI .		No
c	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 Part VI .		No
10a	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.		No
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
11 Has the organization accepted a gift or contribution from any of the following persons?		
a 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 A family member of a person described on 11a above?		
c 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>		
11a		No
11b		No
11c		No

Section B. Type I Supporting Organizations

	Yes	No
1 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>		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <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>		
1		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <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>		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (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?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3 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>		
1	Yes	
2	Yes	
3	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 <input checked="" type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> 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.			
a 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 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>			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a 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 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>			
2a	Yes		
2b	Yes		
3a			
3b			

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)

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

Section B - Minimum Asset Amount

(A) Prior Year

(B) Current Year
(optional)

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

Section C - Distributable Amount

Current Year

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

- 7** Check here if the current year is the organization's first as a non-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
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5	
6 Other distributions (describe in Part VI). See instructions	6	
7 Total annual distributions. Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions	8	
9 Distributable amount for 2022 from Section C, line 6	9	
10 Line 8 amount divided by Line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1 Distributable amount for 2022 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2022 (reasonable cause required-- explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2022:			
a From 2017.			
b From 2018.			
c From 2019.			
d From 2020.			
e From 2021.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2022 distributable amount			
i Carryover from 2017 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2022 from Section D, line 7:			
\$			
a Applied to underdistributions of prior years			
b Applied to 2022 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, explain in Part VI . See instructions.			
6 Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, explain in Part VI . See instructions.			
7 Excess distributions carryover to 2023. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2018.			
b Excess from 2019.			
c Excess from 2020.			
d Excess from 2021.			
e Excess from 2022.			

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

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.

Additional Data

Return to Form

Software ID:

Software Version:

Supplemental Financial Statements

2022

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 informed status.

Part II Conservation Easements.

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

Form for Part II with multiple questions (1-9) regarding conservation easements, including purpose, monitoring, and reporting requirements.

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 with questions (1a, 1b, 2) regarding reporting requirements for art and historical treasures collections.

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 |
|--|-----------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 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
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2** Provide the estimated percentage of the 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 |
|--|---------------|----|
| (i) Unrelated organizations | 3a(i) | |
| (ii) Related organizations | 3a(ii) | |
| b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? | 3b | |
- 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
1a Land				
b Buildings				
c Leasehold improvements		81,022	49,121	31,901
d Equipment		140,983	53,518	87,465
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				119,366

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)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.)		

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)		
Total. (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)	
Total. (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)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	789,236

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.

1	Total revenue, gains, and other support per audited financial statements		1	11,635,609
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	7,651,838	
b	Donated services and use of facilities	2b		
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	-217,200	
e	Add lines 2a through 2d	2e	7,434,638	
3	Subtract line 2e from line 1	3	4,200,971	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1 :			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b	4c	0	
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	4,200,971	

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.

1	Total expenses and losses per audited financial statements		1	3,722,947
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a		
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d	2e	0	
3	Subtract line 2e from line 1	3	3,722,947	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1 :			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b	217,200	
c	Add lines 4a and 4b	4c	217,200	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	3,940,147	

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 -217,200.
PART XII, LINE 4B - OTHER ADJUSTMENTS:	INVESTMENT MGT. FEES NETTED AGAINST REVENUE ON F/S 217,200.

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 for the latest information.

OMB No. 1545-0047

2022

**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 4818 LIBERTY AVENUE PITTSBURGH, PA 15224	45-3674924	501(C)(3)	45,000	0	N/A	N/A	IMPROVE LONG-TERM AND SUSTAINABLE BEHAVIORAL HEALTH OUTCOMES OF CLAIRTON SCHOOL DISTRICT STUDENTS AND EDUCATORS BY SUPPORTING THE THIRD YEAR OF A COLLABORATIVE MODEL/PILOT WITH AHN AND AWAKEN PITTSBURGH.
(2) AMERICAN NATIONAL RED CROSS 2801 LIBERTY AVENUE PITTSBURGH, PA 15222	53-0196605	501(C)(3)	25,000	0	N/A	N/A	INCREASE HEALTH, WELL-BEING, AND HOME SAFETY BY PROVIDING DIRECT ASSISTANCE, FIRE SAFETY AND PREPAREDNESS EDUCATION, AND SMOKE ALARMS TO JEFFERSON INDIVIDUALS/FAMILIES TO REDUCE INJURY AND DEATH FROM FIRES THROUGH PARTNERSHIPS WITH LOCAL FIRE DEPARTMENTS.
(3) ANNA MIDDLETON WAITE LEARNING CENTER 2920 MYER BLVD MCKEESPORT, PA 15132	46-4706628	501(C)(3)	30,000	0	N/A	N/A	PROVIDE OLDER ADULTS THE NECESSARY TOOLS TO ENGAGE IN THE DIGITAL WORLD BY PROVIDING PERSONAL COMPUTERS, WI-FI ACCESS, TECHNICAL SUPPORT, AND TRAINING.
(4) ANSAR OF PITTSBURGH 150 EAST MAIN STREET CARNEGIE, PA 15106	81-4052305	501(C)(3)	25,000	0	N/A	N/A	SUPPORT THE MENTAL HEALTH AND WELLNESS OF REFUGEES LIVING IN DUQUESNE THROUGH INCREASED ACCESS TO RESOURCES TO FOSTER GOOD MENTAL HEALTH PRACTICES AND SELF-EXPRESSION.
(5) BEVERLY'S BIRTHDAYS 11065 PARKER DRIVE NORTH HUNTINGDON, PA 15642	45-4248006	501(C)(3)	50,000	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 CHILDS LIFE BY OFFERING GROUP BIRTHDAY PARTIES, COMMUNITY BABY SHOWERS, PROVIDING TANGIBLE ITEMS OF SUPPORT (BABY/BIRTHDAY

							SUPPLIES AND CLOTHING), AND PROVIDING ACCESS TO THE NEWLY FORMED GREATER PITTSBURGH INFANT FORMULA BANK.
(6) BHUTANESE COMMUNITY ASSOCIATION OF PITTSBURGH 3000 BROWNSVILLE ROAD SUITE C PITTSBURGH, PA 15227	30-0742370	501(C)(3)	22,000	0	N/A	N/A	HOLD FIVE TO SIX CONVENINGS OF 15-20 PARTICIPANTS TARGETING RESIDENTS FROM BETHEL PARK, SOUTH PARK, PLEASANT HILLS, JEFFERSON HILLS, BRENTWOOD, BALDWIN, WHITEHALL, AND WEST MIFFLIN AT BCAP OFFICES OR LOCAL SITES UTILIZING PARTNER CONNECTIONS AND ROBOCALL SERVICES TO ENLIST PARTICIPANTS.
(7) BLACK WOMEN'S POLICY CENTER INC 410 9TH STREET MCKEESPORT, PA 15132	85-3612457	501(C)(3)	195,000	0	N/A	N/A	IMPROVE THE HEALTH AND WELLNESS OF BLACK WOMEN LIVING IN MCKEESPORT, DUQUESNE, CLAIRTON, WEST MIFFLIN AND HOMESTEAD AND SHARE THEIR LIVED EXPERIENCE BY OFFERING SUPPORT AND COACHING THROUGH SYSTEM NAVIGATION, CONNECTION TO RESOURCES, ADVOCACY ON SHAPING PUBLIC POLICY, AND TRAINING AND EDUCATION. SECURE A NEW LOCATION FOR THE BLACK WOMEN'S POLICY CENTER TO CONTINUE ITS COMMUNITY DEVELOPMENT WORK. HOLD A TOTAL OF NINE CONVENINGS WITH BLACK WOMEN FROM CLAIRTON, MCKEESPORT, AND DUQUESNE THROUGH CREATION OF AN 8-10 WOMEN LEADERSHIP COUNCIL.
(8) BOROUGH OF BALDWIN 3344 CHURCHVIEW AVENUE PITTSBURGH, PA 15227	25-6004117	501(C)(3)	100,000	0	N/A	N/A	INCREASE THE OPPORTUNITY TO SAVE JEFFERSON RESIDENTS LIVES FROM SUDDEN CARDIAC ARREST THROUGH THE PURCHASE OF 44 AUTOMATED EXTERNAL DEFIBRILLATORS (AED) TO BE INSTALLED IN POLICE PATROL VEHICLES SERVING BALDWIN BOROUGH, PLEASANT HILLS BOROUGH, AND WEST MIFFLIN BOROUGH.
(9) CITIZEN SCIENCE LAB 1699 WASHINGTON ROAD PITTSBURGH, PA 15228	82-3944451	501(C)(3)	34,000	0	N/A	N/A	INCREASE THE NUMBER OF STUDENTS OF COLOR INTERESTED IN SCIENCE, TECHNOLOGY ENGINEERING AND MATH (STEM) BY PROVIDING 10 INTERACTIVE STEM WORKSHOPS FOR 100 YOUNG PEOPLE PARTICIPATING IN OUT-OF-SCHOOL TIME PROGRAMS AT DRAGONS DEN, SHIM, AND YOUTHPLACES.
(10) CLAIRTON UNITY	33-1193910	501(C)(3)	48,000	0	N/A	N/A	HOLD A CONVENING

GROUP 333 HALCOMB AVE CLAIRTON, PA 15025							FOR 45 PEOPLE FROM CLAIRTON ON THE GATEWAY CLIPPER FOCUSED ON THE SOCIAL DETERMINANTS OF HEALTH. HOLD TWO SEPARATE CONVENINGS-ONE FOR 7TH AND 8TH GRADE STUDENTS AND ONE FOR 9TH-11TH GRADE STUDENTS FROM CLAIRTON FOCUSED ON COMMUNITY NEEDS AND COMMUNITY VIOLENCE.
(11) DRAGON'S DEN 1008 AMITY STREET HOMESTEAD, PA 15120	30-0954832	501(C)(3)	120,000	0	N/A	N/A	BUILD SELF-CONFIDENCE, TRUST, AND SOCIABILITY OF JEFFERSON SCHOOL-AGE YOUTH AND DEVELOP DEEPER COMMUNITY ENGAGEMENT IN HOMESTEAD BY OFFERING AFTER SCHOOL PROGRAMS, SUMMER CAMPS, AND INTRODUCING COMMUNITY WORKSHOPS/EVENTS USING THE CHALLENGE COURSE AND ZIP LINE IN THE HISTORIC ST. MARY MAGDALENE CHURCH.
(12) DUQUESNE UNIVERSITY OF THE HOLY SPIRIT 600 FORBES AVENUE PITTSBURGH, PA 15282	25-1035663	501(C)(3)	60,000	0	N/A	N/A	INCREASE OVERALL HEALTH AND WELLNESS FOR MON VALLEY RESIDENTS BY WORKING TO ADDRESS HEALTH DISPARITIES AND COMMUNITY-IDENTIFIED HEALTH PRIORITIES, WITH A FOCUS ON ASTHMA, CARDIOVASCULAR DISEASE, DIABETES, MENTAL HEALTH, AND SOCIAL DETERMINANTS OF HEALTH.
(13) FILIPINO AMERICAN ASSOCIATION OF PITTSBURGH 200 CHURCH STREET WEST MIFFLIN, PA 15122	25-1864935	501(C)(3)	46,000	0	N/A	N/A	PROVIDE CAPACITY-BUILDING SUPPORT THROUGH AN ORGANIZATIONAL ASSESSMENT IN PARTNERSHIP WITH A CONSULTANT AND ASSIST THE FAAP IN EXPANDING SERVICES AND INCREASING HEALTH AND WELL-BEING IN THE LOCAL FILIPINO COMMUNITY. HOLD A TOTAL OF FIVE CONVENINGS REACHING AN ESTIMATED 100 FILIPINO WOMEN AND MOTHERS FROM BETHEL PARK, HOMESTEAD, MCKEESPORT, SOUTH PARK, AND WEST MIFFLIN.
(14) FOOTBRIDGE FOR FAMILIES INC 322 MALL BLVD PMB 259 MONROEVILLE, PA 15146	84-2077025	501(C)(3)	125,000	0	N/A	N/A	ASSIST 15-30 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. PROVIDE OPERATIONAL ASSISTANCE BECAUSE OF ACCELERATED

								GROWTH OF THIS NONPROFIT DUE TO CONTINUOUS SUPPORT OFFERED TO FAMILIES IN LOW SOCIOECONOMIC COMMUNITIES. OPERATIONAL ASSISTANCE IS NEEDED IN BUILDING THE TECHNOLOGY CAPACITY TO SERVE JEFFERSON RESIDENTS. UPDATING THE TECHNOLOGY PLATFORM WHICH FACILITATES RAPID FINANCIAL RESPONSE TO VENDORS ON BEHALF OF FAMILIES IS CRITICAL TO THE SUPPORT OF FAMILIES.
(15) HEUER HOUSE 514 MONONGAHELA AVENUE GLASSPORT,PA 15045	25-1876265	501(C)(3)	30,000	0	N/A	N/A		HOLD SIX ROUNDTABLE CONVERSATIONS WITH 10 RESIDENTS FROM GLASSPORT AND MCKEESPORT AT HEUER HOUSE LOCATIONS.
(16) LATINO COMMUNITY CENTER 212 9TH STREET PITTSBURGH,PA 15222	82-0647985	501(C)(3)	28,000	0	N/A	N/A		HOLD FOUR CONVENINGS WITH LATINX FAMILIES FROM MCKEESPORT TO DISCUSS HOPES, DREAMS, AND NEEDS OF THE COMMUNITY.
(17) MCKEES POINT DEVELOPMENT GROUP 500 FIFTH AVENUE MCKEESPORT,PA 15132	83-3872921	501(C)(3)	75,000	0	N/A	N/A		DECREASE COMMUNITY VIOLENCE IN MCKEESPORT BY SUPPORTING CONVENINGS AND COMMUNITY BUILDING EVENTS TO ENGAGE RESIDENTS IN ANTI-VIOLENCE EDUCATIONAL PROGRAMMING, FACILITATED COMMUNITY IMPROVEMENT DISCUSSIONS AND COMMUNITY-LED YOUTH PROGRAMMING.
(18) MELANIN MOMMIES INC 5831 FORWARD AVENUE PITTSBURGH,PA 15219	83-1429879	501(C)(3)	40,000	0	N/A	N/A		ASSIST 50 BLACK MOTHERS AND WOMEN LIVING IN THE MON VALLEY COMMUNITIES OF MCKEESPORT, DUQUESNE, AND HOMESTEAD WHO HAVE EXPERIENCED THE IMPACTS OF GUN VIOLENCE IN THEIR HEALING JOURNEY BY PROVIDING FREE, ACCESSIBLE, AND STIGMA-FREE THERAPY AND GRIEF COUNSELING.
(19) MELTING POT MINISTRIES 5225 LIBRARY ROAD BETHEL PARK,PA 15102	14-1942636	501(C)(3)	185,000	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. HOLD FOUR CONVENINGS AT LOCAL SITES WITH RESIDENTS FROM BALDWIN, WHITEHALL, BETHEL PARK, AND SOUTH PARK WITH MEALS PROVIDED AND

							AN OPPORTUNITY FOR AUDIENCE MEMBERS TO SET THE AGENDA.
(20) NEW EVANGELISTIC MINISTRY 424 GRANT AVENUE DUQUESNE, PA 15110	81-1010622	501(C)(3)	6,000	0	N/A	N/A	HOLD ONE CONVENING OF 25 DUQUESNE RESIDENTS AGED 18-65 CENTERED AROUND HEALTH AND WELL-BEING.
(21) OPERATION TROOP APPRECIATION 1219 SCHWEITZER RAOD MCKEESPORT, PA 15135	81-0651982	501(C)(3)	60,000	0	N/A	N/A	PROVIDE CAPACITY-BUILDING SUPPORT FOR COSTS ASSOCIATED WITH A TRANSITION TO A NEW BUILDING TO INCREASE THE HEALTH AND WELL-BEING OF THE VETERAN COMMUNITY LIVING AT OR BELOW THE POVERTY LINE.
(22) PA CLEANWAYS OF ALLEGHENY COUNTY INC 100 HAFNER AVE ETNA, PA 15223	20-3033220	501(C)(3)	30,000	0	N/A	N/A	ENGAGE AND EMPOWER RESIDENTS OF MCKEESPORT TO ELIMINATE ILLEGAL DUMPING BY PARTICIPATING IN COMMUNITY CLEANING OF ILLEGAL DUMPSITES AND ASSESS ILLEGAL DUMPING FOR CLAIRTON, WEST MIFFLIN, AND ELIZABETH TOWNSHIP, AND FORWARD TOWNSHIP.
(23) SOUTHWESTERN PENNSYLVANIA PARTNERSHIP FOR AGING 1323 FREEDOM RD CRANBERRY TWP, PA 16066	25-1643564	501(C)(3)	125,000	0	N/A	N/A	IMPROVE HEALTH AND WELL-BEING FOR JEFFERSON OLDER ADULTS BY INCREASING ACCESS TO RESOURCES IN NEIGHBORHOODS, STRENGTHENING INTERGENERATIONAL CONNECTIONS TO REDUCE ISOLATION AND LONELINESS, AND CHAMPIONING NEW IDEAS THROUGH A COLLABORATIVE EFFORT.
(24) SPECIAL OLYMPICS PENNSYLVANIA THREE RIVERS REGION 300 CEDAR RIDGE DRIVE PITTSBURGH, PA 15205	23-2078543	501(C)(3)	18,000	0	N/A	N/A	HOLD FOUR CONVENINGS TOTALING 50-75 RESIDENTS FROM JEFFERSON HILLS, BRENTWOOD, MCKEESPORT, ELIZABETH TOWNSHIP, AND HOMESTEAD FOCUSED ON THE NEEDS OF PEOPLE WITH DISABILITIES.
(25) STEEL RIVERS COUNCIL OF GOVERNMENTS 1705 MAPLE STREET HOMESTEAD, PA 15120	25-1245642	501(C)(3)	10,000	0	N/A	N/A	HOLD TWO SEPARATE CONVENINGS WITH SENIOR CITIZENS, BUSINESS OWNERS, CLERGY, AND COMMUNITY OFFICIALS TO DISCUSS COMMUNITY NEEDS IN THE ELIZABETH AREA.
(26) STOREHOUSE FOR TEACHERS DBA THE EDUCATION PARTNERSHIP 281 CORLISS ST PITTSBURGH, PA 15220	90-0438744	501(C)(3)	70,000	0	N/A	N/A	IMPROVE THE LONG-TERM OVERALL HEALTH AND WELL-BEING AND EDUCATIONAL OUTCOMES OF STUDENTS ATTENDING CLAIRTON MIDDLE/HIGH SCHOOL, DUQUESNE ELEMENTARY SCHOOL, FOUNDERS' HALL MIDDLE SCHOOL (MCKEESPORT), AND TWIN RIVERS ELEMENTARY SCHOOL (MCKEESPORT) BY PROVIDING EACH STUDENT WITH INDIVIDUAL SCHOOL SUPPLIES AND

							PROVIDING TEACHERS ACCESS TO THE TEACHER RESOURCE CENTER FOR SUPPLIES AND EQUIPMENT.
(27) STUDENT ATHLETES TAKING ACTION TO UNIVERSALLY SUCCEED 2124 NEAL DRIVE MCKEESPORT, PA 15135	88-1985916	501(C)(3)	8,000	0	N/A	N/A	HOLD ONE CONVENING OF STUDENT-ATHLETES ATTENDING MCKEESPORT SCHOOL DISTRICT TO BE HELD AT THE AIU IN HOMESTEAD.
(28) THE BLESSING BOARD 880 BUTLER STREET PITTSBURGH, PA 15223	27-2775566	501(C)(3)	75,000	0	N/A	N/A	INCREASE THE QUALITY OF LIFE AND OVERALL HEALTH AND WELLNESS FOR FAMILIES AND INDIVIDUALS EXPERIENCING LOW-INCOME STATUS LIVING IN THE JEFFERSON REGIONAL SERVICE AREA BY SUPPORTING THE OPERATIONS AND SUSTAINABILITY OF A FURNITURE/DURABLE MEDICAL EQUIPMENT BANK IN WEST MIFFLIN.
(29) THE MON VALLEY INITIATIVE 303-305 EAST 8TH AVENUE HOMESTEAD, PA 15120	25-1591350	501(C)(3)	350,000	0	N/A	N/A	PROVIDE GENERAL OPERATIONAL SUPPORT TO STRENGTHEN MVIS ABILITY TO OFFER HEALTHY OPPORTUNITIES AND ADDRESS THE SOCIAL DETERMINANTS OF HEALTH FOR MON VALLEY RESIDENTS WHICH INCLUDE SERVICES RELATED TO HOUSING, EDUCATION, FINANCIAL LITERACY, AND WORKFORCE DEVELOPMENT. ASSIST UNEMPLOYED AND UNDER-EMPLOYED JEFFERSON RESIDENTS IN ACHIEVING THEIR GOALS OF FINANCIAL SELF-SUFFICIENCY THROUGH OFFERING A COMPREHENSIVE WORKFORCE DEVELOPMENT PROGRAM.
(30) UNITED WAY OF SOUTHWESTERN PENNSYLVANIA 1250 PENN AVENUE PITTSBURGH, PA 15222	25-1043578	501(C)(3)	85,000	0	N/A	N/A	PROVIDE IN-PERSON SUMMER PROGRAMMING WITH HANDS-ON AND SOCIAL AND EMOTIONAL LEARNING OPPORTUNITIES FOR YOUTH IN KINDERGARTEN THROUGH HIGH SCHOOL BY MANAGING AND IMPLEMENTING A COLLABORATIVE FUNDING MODEL.
(31) VENTURE OUTDOORS INC 317 CARSON STREET PITTSBURGH, PA 15219	20-3275291	501(C)(3)	50,000	0	N/A	N/A	CONTINUE TO ENGAGE JEFFERSON YOUTH, MENTORS, AND VOLUNTEERS IN OUTDOOR ACTIVITY THROUGH TARGETED PROGRAMMING PROMOTING HEALTH AND WELLNESS AND OFFER TEENS A MENTORSHIP/ INTERNSHIP PROGRAM TO EXPLORE OUTDOOR CAREERS.
(32) VENTURES IN PEOPLE 1510 VERSAILLES AVE MCKEESPORT, PA 15132	25-1619565	501(C)(3)	45,000	0	N/A	N/A	PROVIDE CAPITAL SUPPORT FOR COSTS ASSOCIATED WITH A NEW ROOF TO ENSURE THE HEALTH AND WELL-BEING OF 30 CHILDREN AND FAMILIES

							ATTENDING EARLY HEAD START PROGRAMMING AND ENABLE FUTURE COMMUNITY OFFERINGS.
(33) VETERANS BREAKFAST CLUB 200 MAGNOLIA PLACE PITTSBURGH, PA 15228	26-4633657	501(C)(3)	26,000	0	N/A	N/A	HOLD TEN CONVENINGS, TWO PER EACH COMMUNITY VOICE FUND GEOGRAPHIC FOCUS AREA, WITH UPWARDS OF 250 LOCAL VETERANS SPREAD BETWEEN DAY AND NIGHT TO DISCUSS VETERANS NEEDS.
(34) WHEN SHE THRIVES 212 SMITHFIELD STREET PITTSBURGH, PA 15222	81-2512633	501(C)(3)	32,000	0	N/A	N/A	HOLD EIGHT WEEKLY SESSIONS WITH SINGLE MOTHERS FROM WEST MIFFLIN AND THE MON VIEW HEIGHTS PUBLIC HOUSING COMMUNITY CENTERED AROUND THE AREAS HIGHLIGHTED IN THE 2019 PITTSBURGH GENDER EQUITY REPORT.
(35) WOMEN FOR A HEALTHY ENVIRONMENT 401 N HIGHLAND AVENUE PITTSBURGH, PA 15206	47-2651553	501(C)(3)	125,000	0	N/A	N/A	INCREASE AWARENESS OF ENVIRONMENTAL HEALTH FACTORS FOR EMPLOYEES AND FAMILIES IN 20 EARLY CHILDCARE CENTERS AND CONDUCT 40 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.
(36) XPOSURE MENTORING PROGRAM 125 S 5TH STREET DUQUESNE, PA 15110	85-1693622	501(C)(3)	6,000	0	N/A	N/A	HOLD A WEEKEND RETREAT TO DISCUSS DUQUESNE COMMUNITY AND YOUTH NEEDS AT CAMP ALLEGHENY.
(37) YOUNG PEOPLE IN RECOVERY 201 E 4TH ST LOVELAND, CO 80537	46-4109067	501(C)(3)	42,000	0	N/A	N/A	IMPROVE ACCESS TO A PEER-RECOVERY NETWORK, TREATMENT, EDUCATION, HOUSING, AND EMPLOYMENT FOR JEFFERSON YOUNG PEOPLE IN SUBSTANCE ABUSE RECOVERY THROUGH LAUNCHING A PEER-LED CHAPTER TO CONDUCT PRO-SOCIAL ACTIVITIES, ALL-RECOVERY MEETINGS, AND LIFE SKILL WORKSHOPS IN THE JEFFERSON AREA.
(38) YOUTH OPPORTUNITIES DEVELOPMENT PO BOX 180 CLAIRTON, PA 15025	45-5429765	501(C)(3)	45,000	0	N/A	N/A	PROVIDE CAPACITY-BUILDING SUPPORT FOR COSTS ASSOCIATED WITH A TRANSITION TO NEW SPACE TO PROVIDE OUT-OF-SCHOOL TIME PROGRAMMING FOR CLAIRTON YOUTH IN PARTNERSHIP WITH CLAIRTON CITY SCHOOL DISTRICT.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 38

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 for instructions and the latest information.**

2022

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
1b		
2		
4a		No
4b		No
4c		No
5a		No
5b		No
6a		No
6b		No
7		No
8		No
9		

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

Return to Form

Software ID:

Software Version:

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 for the latest information.

2022**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

Return to Form

Software ID:

Software Version:

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047
2022
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 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
1a		No
1b	Yes	
1c		No
1d		No
1e		No
1f		No
1g		No
1h		No
1i		No
1j		No
1k		No
1l	Yes	
1m		No
1n	Yes	
1o		No
1p	Yes	
1q		No
1r		No
1s		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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