

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2023

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

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

A For the **2023** calendar year, or tax year beginning and ending

B Check if applicable: Address change Name change Initial return Final return/terminated Amended return Application pending	C Name of organization UNITED WAY OF BERKS COUNTY, INC.		D Employer identification number 23-1655375
	Doing business as		E Telephone number (610) 685-4550
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	G Gross receipts \$ 19,308,235.
	25 N. 2ND STREET, SUITE 101		H(a) Is this a group return for subordinates? Yes <input checked="" type="checkbox"/> No
	City or town, state or province, country, and ZIP or foreign postal code READING, PA 19601		H(b) Are all subordinates included? Yes No
F Name and address of principal officer: TAMMY L. WHITE SAME AS C ABOVE			If "No," attach a list. See instructions
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527			
J Website: WWW.UWBERKS.ORG			
K Form of organization: <input checked="" type="checkbox"/> Corporation Trust Association Other			L Year of formation: 1963 M State of legal domicile: PA

Part I Summary			
Activities & Governance	1 Briefly describe the organization's mission or most significant activities: INSPIRING COLLABORATION, VOLUNTEERISM AND FINANCIAL SUPPORT TO BUILD A STRONGER COMMUNITY		
	2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	38
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	38
	5 Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	34
	6 Total number of volunteers (estimate if necessary)	6	2294
	7 a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	10,296,839.	11,325,499.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	79,472.	229,630.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	67,398.	378,859.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	21,729.	21,938.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	10,465,438.	11,955,926.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	9,731,595.	9,183,070.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	0.	0.
	16 a Professional fundraising fees (Part IX, column (A), line 11e)	2,356,331.	2,619,276.
	b Total fundraising expenses (Part IX, column (D), line 25)	0.	0.
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,660,669.	
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	1,664,032.	1,813,821.
19 Revenue less expenses. Subtract line 18 from line 12	13,751,958.	13,616,167.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	-3,286,520.	-1,660,241.
	21 Total liabilities (Part X, line 26)	Beginning of Current Year	End of Year
	22 Net assets or fund balances. Subtract line 21 from line 20	32,073,316.	31,457,292.
		4,446,069.	3,827,611.
		27,627,247.	27,629,681.

Part II Signature Block						
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.						
Sign Here	Signature of officer				Date	
	TAMMY L. WHITE, PRESIDENT					
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed	PTIN	
	LINDA S HIMEBACK, CPA	LINDA S HIMEBACK, CP	05/15/24	<input type="checkbox"/>	P00042618	
Preparer Use Only	Firm's name	Firm's EIN			Phone no.	
	HERBEIN+COMPANY, INC.	23-2415973			610-378-1175	
	Firm's address					
	2763 CENTURY BOULEVARD					
	READING, PA 19610					

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: UNITED WAY OF BERKS COUNTY IMPROVES LIVES BY INSPIRING COLLABORATION, VOLUNTEERISM AND FINANCIAL SUPPORT TO BUILD A STRONGER COMMUNITY.

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 [X] No

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code:) (Expenses \$ 11,124,782. including grants of \$ 9,183,070.) (Revenue \$ 229,630.) MORE THAN 190,000 CHILDREN, FAMILIES AND SENIORS BENEFITTED FROM VITAL HEALTH AND HUMAN SERVICES PROGRAMS FUNDED BY UNITED WAY OF BERKS COUNTY (UWBC) THROUGHOUT 2023. UWBC'S WORK AND INVESTMENTS FOCUS ON FOUR AREAS: EDUCATION, FINANCIAL STABILITY, HEALTH AND SAFETY NET SERVICES.

SEE ADDITIONAL INFORMATION ON SCH O.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

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

4e Total program service expenses 11,124,782.

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Yes, No. Rows include questions 1 through 21 regarding organizational requirements and schedules A through I.

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question number, Yes, No. Rows 22-38 covering various organizational requirements.

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 number, Yes, No. Rows 1a, 1b, 1c regarding Form 1096 and backup withholding rules.

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

Table with 3 main columns: Question/Description, Yes, No. Rows include 2a (employees: 34), 2b, 3a, 3b, 4a, 4b, 5a, 5b, 5c, 6a, 6b, 7 (Organizations that may receive deductible contributions under section 170(c)), 8 (Sponsoring organizations maintaining donor advised funds), 9 (Sponsoring organizations maintaining donor advised funds), 10 (Section 501(c)(7) organizations), 11 (Section 501(c)(12) organizations), 12a (Section 4947(a)(1) non-exempt charitable trusts), 13 (Section 501(c)(29) qualified nonprofit health insurance issuers), 14a, 14b, 15, 16, 17.

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on 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

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
	1a 38		
b	Enter the number of voting members included on line 1a, above, who are independent		
	1b 38		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	X	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

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

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

Section C. Disclosure

- 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 Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records
MONICA RUANO-WENRICH - (610) 685-4550
25 N. 2ND STREET, SUITE 101, READING, PA 19601

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, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
 - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

Check this box if neither the 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 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) TAMMY L. WHITE PRESIDENT	37.50			X			183,028.	0.	22,053.	
(2) MONICA RUANO-WENRICH SR VP FINANCE & ADMIN	37.50			X			115,542.	0.	20,976.	
(3) JEAN MORROW SR VP LEADERSHIP UNITED	37.50					X	110,796.	0.	13,109.	
(4) ASHLEY CHAMBERS SR VP COMMUNITY IMPACT	37.50					X	100,608.	0.	13,135.	
(5) SCOTT REHR CHAIR	1.00	X		X			0.	0.	0.	
(6) JONI NAUGLE VICE CHAIR	1.00	X		X			0.	0.	0.	
(7) CHRISTINA WEEBER SECRETARY/TREASURER	1.00	X		X			0.	0.	0.	
(8) RUTHANN WOLL ASST. SECRETARY/TREASURER	1.00	X		X			0.	0.	0.	
(9) JOHN ARNOLD DIRECTOR	1.00	X					0.	0.	0.	
(10) SARA AULESTIA DIRECTOR	1.00	X					0.	0.	0.	
(11) JOHN BOBO DIRECTOR	1.00	X					0.	0.	0.	
(12) JAMES BOSCOV DIRECTOR	1.00	X					0.	0.	0.	
(13) ANTHONY COX DIRECTOR	1.00	X					0.	0.	0.	
(14) KELLEY CROZIER, M.D. DIRECTOR	1.00	X					0.	0.	0.	
(15) MICHAEL DUFF DIRECTOR	1.00	X					0.	0.	0.	
(16) ROBERT FIRELY DIRECTOR	1.00	X					0.	0.	0.	
(17) STEVEN FISHER 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 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			
(18) ROBERT GOONAN DIRECTOR	1.00	X						0.	0.	0.
(19) TERRY GRASSLEY DIRECTOR	1.00	X						0.	0.	0.
(20) BRADLEY HALL DIRECTOR	1.00	X						0.	0.	0.
(21) VICTORIA HAWKINS DIRECTOR	1.00	X						0.	0.	0.
(22) ANNETTE HINES DIRECTOR	1.00	X						0.	0.	0.
(23) JASON HOERR DIRECTOR	1.00	X						0.	0.	0.
(24) MICHAEL KRUT DIRECTOR	1.00	X						0.	0.	0.
(25) WESLIE LIANA DIRECTOR AS OF MAY	1.00	X						0.	0.	0.
(26) DR. SUSAN LOONEY DIRECTOR	1.00	X						0.	0.	0.
1b Subtotal								509,974.	0.	69,273.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								509,974.	0.	69,273.

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 4

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
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>	X	
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>		X

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
NONE		

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

SEE PART VII, SECTION A CONTINUATION SHEETS

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 line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(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			
(27) DR. JOSEPH MACHAROLA DIRECTOR	1.00	X						0.	0.	0.
(28) NICK MARMONTELLO DIRECTOR	1.00	X						0.	0.	0.
(29) DR. JENNIFER MURRAY DIRECTOR	1.00	X						0.	0.	0.
(30) MISSY ORLANDO DIRECTOR	1.00	X						0.	0.	0.
(31) RENDY ORTIZ DIRECTOR	1.00	X						0.	0.	0.
(32) CRAIG PERROTY DIRECTOR	1.00	X						0.	0.	0.
(33) SUE PERROTY DIRECTOR	1.00	X						0.	0.	0.
(34) FRANCIS POST DIRECTOR	1.00	X						0.	0.	0.
(35) SIDNEY PURNELL DIRECTOR	1.00	X						0.	0.	0.
(36) MIKE REESE DIRECTOR	1.00	X						0.	0.	0.
(37) ROBERTO SANCHEZ DIRECTOR	1.00	X						0.	0.	0.
(38) ENGUITA MAITE TENA DIRECTOR	1.00	X						0.	0.	0.
(39) DAVID TURNER DIRECTOR	1.00	X						0.	0.	0.
(40) PATRICK VELEKEI DIRECTOR	1.00	X						0.	0.	0.
(41) KAREN WANG M.D. DIRECTOR	1.00	X						0.	0.	0.
(42) KIM WOERLE DIRECTOR	1.00	X						0.	0.	0.
(43) RICHARD EHST DIRECTOR THROUGH MARCH	1.00	X						0.	0.	0.
(44) DAVID CAPITANO DIRECTOR THROUGH MAY	1.00	X						0.	0.	0.
Total to Part VII, Section A, line 1c										

Part VIII Statement of Revenue

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

				(A)	(B)	(C)	(D)	
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a	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	11,325,499.				
	g	Noncash contributions included in lines 1a-1f	1g	\$ 391,243.				
	h	Total. Add lines 1a-1f		11,325,499.				
Program Service Revenue	2 a	TRAINING & WORKSHOP FEES	Business Code	611430	107,624.	107,624.		
	b	READ ALLIANCE		611710	69,630.	69,630.		
	c	EVENTS		611430	52,376.	52,376.		
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f			229,630.			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)			693,071.		693,071.	
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
	6 a	Gross rents	6a	(i) Real				
				(ii) Personal				
	b	Less: rental expenses ...	6b					
	c	Rental income or (loss)	6c					
	d	Net rental income or (loss)						
	7 a	Gross amount from sales of assets other than inventory	7a	(i) Securities				
				(ii) Other				
					7,038,097.			
	b	Less: cost or other basis and sales expenses	7b	7,352,309.				
	c	Gain or (loss)	7c	-314,212.				
	d	Net gain or (loss)			-314,212.		-314,212.	
8 a	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							
9 a	Gross income from gaming activities. See Part IV, line 19	9a						
b	Less: direct expenses	9b						
c	Net income or (loss) from gaming activities							
10 a	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							
Miscellaneous Revenue	11 a	ADMINISTRATION FEES	Business Code	561000	20,645.	20,645.		
	b	MISCELLANEOUS		900099	1,293.	1,293.		
	c							
	d	All other revenue						
	e	Total. Add lines 11a-11d			21,938.			
12	Total revenue. See instructions			11,955,926.	251,568.	0.	378,859.	

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	9,183,070.	9,183,070.		
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	341,599.	88,859.	184,390.	68,350.
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	1,772,000.	816,221.	292,475.	663,304.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	348,949.	134,279.	58,184.	156,486.
10 Payroll taxes	156,728.	69,095.	33,246.	54,387.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	24,191.	12,776.	3,206.	8,209.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	66,208.	28,681.	14,599.	22,928.
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	739,743.	390,696.	98,010.	251,037.
12 Advertising and promotion	182,924.	60,501.	171.	122,252.
13 Office expenses	107,336.	91,236.	2,448.	13,652.
14 Information technology				
15 Royalties				
16 Occupancy	181,743.	79,019.	38,817.	63,907.
17 Travel	17,299.	10,341.	3,110.	3,848.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates	133,949.	42,060.	33,648.	58,241.
22 Depreciation, depletion, and amortization	146,837.	58,932.	33,021.	54,884.
23 Insurance	41,562.	13,167.	10,401.	17,994.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a UW SPONSORED MEETINGS	94,375.	32,911.	1,205.	60,259.
b MISCELLANEOUS EXPENSES	59,226.	7,262.	20,125.	31,839.
c EQUIPMENT RENTAL & MAIN	18,428.	5,676.	3,660.	9,092.
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	13,616,167.	11,124,782.	830,716.	1,660,669.
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 X

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing		1	
	2 Savings and temporary cash investments	6,163,786.	2	5,373,424.
	3 Pledges and grants receivable, net	6,082,168.	3	6,516,877.
	4 Accounts receivable, net	29,017.	4	96,510.
	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	4,135.	9	20,290.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 670,095.		
	b Less: accumulated depreciation	10b 383,888.	405,735.	10c 286,207.
	11 Investments - publicly traded securities	16,593,141.	11	16,423,067.
	12 Investments - other securities. See Part IV, line 11	825,082.	12	884,531.
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	1,970,252.	15	1,856,386.
16 Total assets. Add lines 1 through 15 (must equal line 33)	32,073,316.	16	31,457,292.	
Liabilities	17 Accounts payable and accrued expenses	1,332,558.	17	704,050.
	18 Grants payable		18	
	19 Deferred revenue	50,000.	19	52,517.
	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	3,063,511.	25	3,071,044.
	26 Total liabilities. Add lines 17 through 25	4,446,069.	26	3,827,611.
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	10,719,844.	27	9,559,464.
	28 Net assets with donor restrictions	16,907,403.	28	18,070,217.
	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	27,627,247.	32	27,629,681.
	33 Total liabilities and net assets/fund balances	32,073,316.	33	31,457,292.

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	11,955,926.
2	Total expenses (must equal Part IX, column (A), line 25)	2	13,616,167.
3	Revenue less expenses. Subtract line 2 from line 1	3	-1,660,241.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	27,627,247.
5	Net unrealized gains (losses) on investments	5	2,048,057.
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 on Schedule O)	9	-385,382.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	27,629,681.

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		X
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	X	
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 on Schedule O.	X	
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? _____		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____		

Form 990 (2023)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

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

2023

Open to Public Inspection

Name of the organization **UNITED WAY OF BERKS COUNTY, INC.** Employer identification number **23-1655375**

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 **section 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 _____
 - 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		
Total						

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 fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	11,144,072.	21,426,022.	12,544,375.	10,296,839.	11,325,499.	66,736,807.
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	11,144,072.	21,426,022.	12,544,375.	10,296,839.	11,325,499.	66,736,807.
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)						4,754,367.
6 Public support. Subtract line 5 from line 4.						61,982,440.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4	11,144,072.	21,426,022.	12,544,375.	10,296,839.	11,325,499.	66,736,807.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	239,570.	321,510.	1,242,838.	579,625.	693,071.	3,076,614.
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.)	22,904.	57,533.	20,187.	21,729.	21,938.	144,291.
11 Total support. Add lines 7 through 10						69,957,712.
12 Gross receipts from related activities, etc. (see instructions)					12	339,080.
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						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	88.60	%
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	89.93	%
16a 33 1/3% support test - 2023. 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			<input checked="" type="checkbox"/>
b 33 1/3% support test - 2022. 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			<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2023. 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			<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2022. 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			<input type="checkbox"/>
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			<input type="checkbox"/>

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

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

Section A. Public Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c 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.

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

Section C. Computation of Public Support Percentage

Table with 2 columns: Line number, Percentage. Row 15: Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)) 15 %; Row 16: Public support percentage from 2022 Schedule A, Part III, line 15 16 %

Section D. Computation of Investment Income Percentage

Table with 2 columns: Line number, Percentage. Row 17: Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f)) 17 %; Row 18: Investment income percentage from 2022 Schedule A, Part III, line 17 18 %

19a 33 1/3% support tests - 2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

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

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, 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? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>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).</i>		
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? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as 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? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
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))? <i>If "Yes," provide detail in Part VI.</i>		
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? <i>If "Yes," provide detail in Part VI.</i>		
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? <i>If "Yes," provide detail in Part VI.</i>		
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)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

Table with 3 columns: Question, Yes, No. Rows 11, 11a, 11b, 11c.

Section B. Type I Supporting Organizations

Table with 3 columns: Question, Yes, No. Rows 1, 2.

Section C. Type II Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1.

Section D. All Type III Supporting Organizations

Table with 3 columns: Question, Yes, No. Rows 1, 2, 3.

Section E. Type III Functionally Integrated Supporting Organizations

Table with 3 columns: Question, Yes, No. Rows 1, 2, 3, 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):		
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 0.85 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	<input type="checkbox"/> 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 - <i>provide details in Part VI</i>)	5
6	Other distributions (<i>describe in Part VI</i>). 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 (<i>provide details in Part VI</i>). See instructions.	8
9	Distributable amount for 2023 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-2023	(iii) Distributable Amount for 2023
1 Distributable amount for 2023 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2023 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2023			
a From 2018			
b From 2019			
c From 2020			
d From 2021			
e From 2022			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2023 distributable amount			
i Carryover from 2018 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2023 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2023 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2024. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2019			
b Excess from 2020			
c Excess from 2021			
d Excess from 2022			
e Excess from 2023			

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.)

SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

ADMINISTRATION FEES

2019 AMOUNT: \$ 22,904.

2020 AMOUNT: \$ 57,533.

2021 AMOUNT: \$ 20,187.

2022 AMOUNT: \$ 21,729.

2023 AMOUNT: \$ 21,938.

Schedule B
(Form 990)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Attach to Form 990, 990-EZ, or 990-PF.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)(3) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year \$ _____

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

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2023)

Name of organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	<hr/> <hr/> <hr/>	\$ <u>1,320,356.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____
	_____	\$ _____	_____

Name of organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

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

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

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization UNITED WAY OF BERKS COUNTY, INC. Employer identification number 23-1655375

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 3 columns: Question, (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 regarding donor property and grant fund usage.

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

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose(s) of conservation easements, a table for lines 2a-2d (Total number, acreage, certified historic structures, and non-certified historic structures), and questions 3-9 regarding modifications, monitoring, and reporting.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include questions 1a and 1b regarding reporting of art and historical treasures, and question 2 regarding financial gain reporting.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2023

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 make 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 program
 - 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	7,769,023.	9,840,583.	9,104,248.	8,074,015.	7,071,729.
b Contributions	61,916.	18,662.	12,647.	94,680.	6,346.
c Net investment earnings, gains, and losses	1,327,532.	-1,741,710.	1,086,706.	1,270,441.	1,342,741.
d Grants or scholarships					
e Other expenditures for facilities and programs	350,591.	348,512.	363,018.	334,888.	346,801.
f Administrative expenses					
g End of year balance	8,807,880.	7,769,023.	9,840,583.	9,104,248.	8,074,015.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment 22.7100 %
 - b Permanent endowment 77.2900 %
 - 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? | X | |
| (ii) Related organizations? | | X |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 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		22,258.	8,852.	13,406.
d Equipment		349,419.	255,074.	94,345.
e Other		298,418.	119,962.	178,456.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				286,207.

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. (Col. (b) must equal Form 990, Part X, line 12, col. (B))		

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. (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

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) BENEFICIAL INTEREST IN LIFE INSURANCE POLICY	28,718.
(2) RIGHT-OF-USE ASSET - OPERATING LEASE	1,827,668.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	1,856,386.

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) DUE TO OTHER UNITED WAYS	294,101.
(3) DUE TO DESIGNATED AFFILIATED	
(4) AGENCIES	886,331.
(5) OPERATING LEASE LIABILITY	1,890,612.
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	3,071,044.

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 FASB 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	12,793,238.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	2,048,057.	
b	Donated services and use of facilities	2b	70,667.	
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	-62,605.	
e	Add lines 2a through 2d	2e	2,056,119.	
3	Subtract line 2e from line 1		3	10,737,119.
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	66,208.	
b	Other (Describe in Part XIII.)	4b	1,152,599.	
c	Add lines 4a and 4b	4c	1,218,807.	
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	11,955,926.

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	12,790,804.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a	70,667.	
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d	2e	70,667.	
3	Subtract line 2e from line 1		3	12,720,137.
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	66,208.	
b	Other (Describe in Part XIII.)	4b	829,822.	
c	Add lines 4a and 4b	4c	896,030.	
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	13,616,167.

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.

PART V, LINE 4:

THE ORGANIZATION'S ENDOWMENT CONSISTS OF SIXTEEN DONOR-RESTRICTED SUB-FUNDS AND ONE BOARD-DESIGNATED SUB-FUND, ALL OF WHICH ARE TO BE HELD INDEFINITELY, WITH THE INCOME EXPENDABLE FOR OPERATIONS AS DIRECTED BY DONORS OR THE BOARD OF DIRECTORS.

PART X, LINE 2:

IN ACCORDANCE WITH GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, THE ORGANIZATION ACCOUNTS FOR UNCERTAIN TAX POSITIONS RELATIVE TO UNRELATED BUSINESS INCOME, IF ANY, AS REQUIRED.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

Part XIII Supplemental Information (continued)

UNREALIZED GAINS/(LOSSES) ON BENEFICIAL INTEREST 59,449.

TRANSFERS BETWEEN NET ASSET RESTRICTIONS -122,054.

TOTAL TO SCHEDULE D, PART XI, LINE 2D -62,605.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED CONTRIBUTIONS 1,152,599.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED ALLOCATIONS 829,822.

**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

2023

**Open to Public
Inspection**

Name of the organization **UNITED WAY OF BERKS COUNTY, INC.** Employer identification number **23-1655375**

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.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
AMERICAN CANCER SOCIETY 498 BELLEVUE AVENUE READING, PA 19605	13-1788491	501(C)(3)	100,003.	0.			PARTNER AGENCY INVESTMENTS: HEALTH
AMERICAN RED CROSS - TRI COUNTY CHAPTER - 3939 BROADWAY - ALLENTOWN, PA 18104	53-0196605	501(C)(3)	191,311.	0.			PARTNER AGENCY INVESTMENTS: DISASTER RESPONSE, VETERANS TRANSPORTATION
BARRIO ALEGRIA 140 N. 5TH STREET READING, PA 19601	83-1617182	501(C)(3)	30,000.	0.			ONE-TIME GRANT: LEAD FELLOW POSITION TRAINING AND DEVELOPMENT
BERKS AREA YOUTH RECREATION, INC. 19 VERMONT ROAD SINKING SPRING, PA 19608	23-3070480	501(C)(3)	10,000.	0.			ONE-TIME GRANTS: YOUTH INITIATIVE PROGRAM; READY SET READ SUMMER LEARNING GRANT
BERKS COALITION TO END HOMELESSNESS - 600 PENN STREET - READING, PA 19601	37-1575390	501(C)(3)	52,410.	0.			PARTNER AGENCY INVESTMENTS: HOMELESS PREVENTION
BERKS COMMUNITY HEALTH CENTER 1040 LIGGETT AVENUE READING, PA 19611	27-3795179	501(C)(3)	32,000.	0.			ONE-TIME GRANT: OAKBROOK COMMUNITY HEALTH WORKER

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **64.**

3 Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2023

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BERKS COUNSELING CENTER 645 PENN STREET, 2ND FLOOR READING, PA 19601	23-2043478	501(C)(3)	288,410.	0.			HEALTH FOCUSED GRANT: FAMILY CENTER & INTENSIVE OUTPATIENT PROGRAM
BERKS ENCORE 40 NORTH 9TH STREET READING, PA 19601	23-1656050	501(C)(3)	154,356.	0.			PARTNER AGENCY INVESTMENTS: MEALS ON WHEELS
BERKS LATINO WORKFORCE DEVELOPMENT CORPORATION - 450 S 6TH STREET - READING, PA 19602	84-2735102	501(C)(3)	125,000.	0.			FOCUS GRANT: WORKFORCE DEVELOPMENT
BIG BROTHERS/BIG SISTERS OF BERKS COUNTY - 303 WINDSOR STREET - READING, PA 19601	23-6463246	501(C)(3)	281,806.	0.			PARTNER AGENCY INVESTMENTS: MENTORING PROGRAM
BIRDSBORO COMMUNITY MEMORIAL CENTER - 201 EAST MAIN STREET - BIRDSBORO, PA 19508	23-1365317	501(C)(3)	61,348.	0.			PARTNER AGENCY INVESTMENTS: OUT OF SCHOOL EDUCATION PROGRAMMING
BOYERTOWN AREA MULTI-SERVICE, INC. 200 WEST SPRING STREET BOYERTOWN, PA 19512	23-7289405	501(C)(3)	72,732.	0.			PARTNER AGENCY INVESTMENTS: SUPPORTIVE SERVICES, CASE MANAGEMENT & MEALS ON WHEELS
BRING THE CHANGE 47 NANTUCKET DRIVE READING, PA 19605	83-4062630	501(C)(3)	15,000.	0.			ONE-TIME GRANT: AGENTS OF CHANGE LEADERSHIP PROGRAM
CASA OF BERKS COUNTY 845 N. PARK ROAD WYOMISSING, PA 19610	47-3440847	501(C)(3)	30,000.	0.			ONE-TIME INVESTMENT GRANT: AT RISK YOUTH PROGRAM
CATHOLIC CHARITIES, DIOCESE OF ALLENTOWN - 400 WASHINGTON STREET, SUITE 100 - READING, PA 19601	23-1352211	501(C)(3)	65,187.	0.			PARTNER AGENCY INVESTMENTS: CASE MANAGEMENT/COUNSELING FOR VETERANS & FAMILIES;

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CENTRO HISPANO DANIEL TORRES, INC. 201 PENN STREET, SUITE 101 READING, PA 19601	23-2041081	501(C)(3)	289,315.	0.			PARTNER AGENCY INVESTMENTS: SOCIAL SERVICES, OPENING DOORS
CLARE OF ASSISI HOUSE 325 S 12TH STREET READING, PA 19602	47-1044541	501(C)(3)	25,000.	0.			RAPID RESPONSE GRANT: FUNDING FOR PAYROLL AND OPERATING EXPENES
CO-COUNTY WELLNESS SERVICES 429 WALNUT STREET READING, PA 19601	23-2657264	501(C)(3)	164,165.	0.			PARTNER AGENCY INVESTMENTS: BERKS TEENS MATTER
COMMUNITIES IN SCHOOLS OF EASTERN PA - 739 N 12TH STREET - ALLENTOWN, PA 18102	23-2222874	501(C)(3)	64,372.	0.			PARTNER AGENCY INVESTMENTS: INTEGRATED STUDENT SUPPORT
COMMUNITY ALLIANCE AND REINVESTMENT ENDEAVOR, INC. - PO BOX 8081 - READING, PA 19603	23-2611310	501(C)(3)	13,000.	0.			ONE TIME GRANT: HVAC SYSTEM UPGRADE & COMMERICAL REFRIGERATION UNIT
COMMUNITY SERVICES FOR CHILDREN 1520 HANOVER AVE ALLENTOWN, PA 18109	23-2204725	501(C)(3)	317,566.	0.			PARTNER AGENCY INVESTMENTS: EARLY CHILDHOOD EDUCATION
CONNECTIONS WORK 19TH N. 6TH STREET, 4TH FLOOR READING, PA 19601	23-1969810	501(C)(3)	545,011.	0.			PARTNER AGENCY INVESTMENTS: PRISONER REENTRY SERVICES; WORKFORCE DEVELOPMENT
DAYSRING HOMES, INC. PO BOX 158 SHILLINGTON, PA 19607	23-2622102	501(C)(3)	8,910.	0.			RAPID RESPONSE GRANT: AED PURCHASES
EASTER SEALS EASTERN PENNSYLVANIA 1501 LEHIGH STREET, SUITE 201 ALLENTOWN, PA 18103	23-2823542	501(C)(3)	396,691.	0.			PARTNER AGENCY INVESTMENTS: PEDIATRIC CLINICS, OUTPATIENT THERAPY, THERAPEUTIC

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
EMERGENCY MEDICAL TRAINING 3933 PERKIOMEN AVE READING, PA 19606	23-7407937	501(C)(3)	14,028.	0.			RAPID RESPONSE GRANT: TRAINING EQUIPMENT
FAMILY GUIDANCE CENTER 1235 PENN AVENUE, SUITE 205-206 READING, PA 19610	23-1679207	501(C)(3)	487,567.	0.			PARTNER AGENCY INVESTMENTS: COUNSELING; COVID RESPONSE GRANT: PART-TIME PHYSICIAN
FAMILY PROMISE OF BERKS COUNTY 325 N. 5TH STREET READING, PA 19601	20-4557683	501(C)(3)	52,231.	0.			PARTNER AGENCY INVESTMENTS; U-TURN
FRIEND, INC. COMMUNITY SERVICES 658D NOBLE STREET KUTZTOWN, PA 19530	23-1924643	501(C)(3)	187,457.	0.			PARTNER AGENCY INVESTMENTS: COMMUNITY RESOURCE CONNECTIONS
GIRL SCOUTS OF EASTERN PENNSYLVANIA - 330 MANOR ROAD - MIQUON, PA 19444	23-1352309	501(C)(3)	140,109.	0.			PARTNER AGENCY INVESTMENTS: OUTREACH TO AT-RISK GIRLS
GREATER READING MENTAL HEALTH ALLIANCE - 1234 PENN AVENUE - WYOMISSING, PA 19610	23-1522636	501(C)(3)	169,906.	0.			PARTNER AGENCY INVESTMENTS: ADVOCACY & SUPPORT GROUPS; COVID RESPONSE GRANT:
HABITAT FOR HUMANITY OF BERKS COUNTY - 201 WASHINGTON STREET; SUITES 329-330 - READING, PA 19601	23-2500851	501(C)(3)	88,475.	0.			PARTNER AGENCY INVESTMENTS: HOME CONSTRUCTION/RENOVATION FOR LOW INCOME FAMILIES
HANNAH'S HOPE MINISTRIES 736 UPLAND AVENUE READING, PA 17607	45-4674547	501(C)(3)	14,766.	0.			RAPID RESPONSE GRANT: BUILDING REMEDIATIONS
HAWK MOUNTAIN COUNCIL BOY SCOUTS OF AMERICA - 5027 POTTSVILLE PIKE - READING, PA 19605	23-1352047	501(C)(3)	317,496.	0.			PARTNER AGENCY INVESTMENTS: TRADITIONAL & URBAN SCOUTING

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HELPING HARVEST 117 MORGAN DRIVE READING, PA 19608	22-2456238	501(C)(3)	83,349.	0.			PARTNER AGENCY INVESTMENTS; FOOD ACCESS & DISTRIBUTION
HOPE RESCUE MISSION 645 N 6TH ST READING, PA 19601	23-1413677	501(C)(3)	20,000.	0.			COVID RESPONSE GRANT: SUPPORTIVE SERVICES FOR CLIENTS
IM ABLE FOUNDATION 1007 HILL AVENUE, BLDG 17 WYOMISSING, PA 19610	06-1783154	501(C)(3)	20,000.	0.			ONE-TIME INVESTMENT GRANT: EXPANSION OF OPERATION LEAD FROM THE FRONT PROGRAM
JEWISH FEDERATION OF READING, PA 1100 BERKSHIRE BOULEVARD, SUITE 125 WYOMISSING, PA 19610	23-1728784	501(C)(3)	85,902.	0.			PARTNER AGENCY INVESTMENTS: FOOD BANK, SUPPORTIVE SERVICES
LITERACY COUNCIL OF READING-BERKS 35 SOUTH DWIGHT STREET WEST LAWN, PA 19609	23-2004957	501(C)(3)	134,264.	0.			PARTNER AGENCY INVESTMENTS: ENGLISH FORWARD; LITERACY TRAINING & ESL
MANUFACTURERS RESOURCE CENTER 7200A WINDSOR DRIVE ALLENTOWN, PA 18106	23-2514764	501(C)(3)	10,000.	0.			ONE-TIME INVESTMENT GRANT: STEM CAREERS
MARY'S SHELTER 615 KENHORST BLVD READING, PA 19611	23-2722494	501(C)(3)	35,750.	0.			PARTNER AGENCY INVESTMENTS: SHELTER SERVICES PROGRAM
MIDPENN LEGAL SERVICES 213-A NORTH FRONT STREET HARRISBURG, PA 17101	23-7101191	501(C)(3)	87,450.	0.			PARTNER AGENCY INVESTMENTS: LEGAL REPRESENTATION FOR BASIC NEEDS
MILLER-KEYSTONE BLOOD CENTER 2171 28TH STREET SW ALLENTOWN, PA 18103	23-1731796	501(C)(3)	20,000.	0.			ONE-TIME GRANT: DIVERSE DONOR PROGRAM

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NEW JOURNEY COMMUNITY OUTREACH, INC. - 138 S 6TH STREET - READING, PA 19602	46-3623955	501(C)(3)	52,231.	0.			PARTNER AGENCY INVESTMENTS: SOUP KITCHEN & FOOD PANTRY
OLIVET BOYS & GIRLS CLUB OF READING & BERKS COUNTY - 1161 PERSHING BOULEVARD - READING, PA 19611	23-1365380	501(C)(3)	1,032,060.	0.			PARTNER AGENCY INVESTMENTS: COMPREHENSIVE YOUTH DEVELOPMENT
OPPORTUNITY HOUSE 430 NORTH SECOND STREET READING, PA 19601	23-2543677	501(C)(3)	274,073.	0.			PARTNER AGENCY INVESTMENTS: CHILDCARE, EMERGENCY SHELTER; ONE-TIME GRANT:
PENN STATE HEALTH - ST. JOSEPH'S 2500 BERNVILLE RD BERN TOWNSHIP, PA 19605	23-1352211	501(C)(3)	139,500.	0.			ONE TIME GRANT: VEGGIE RX & HEALTHY FOOD ACCESS; HEALTH FOCUSED GRANT: VEGGIE RX EXPANSION &
READING AREA COMMUNITY COLLEGE 10 SOUTH SECOND STREET, PO BOX 1706 READING, PA 19603	23-1745816		159,685.	0.			PARTNER AGENCY INVESTMENTS: BILINGUAL ESL PROGRAM; WORKFORCE DEVELOPMENT FOCUSED
READING HOSPITAL/TOWER HEALTH 420 S 5TH AVENUE WEST READING, PA 19611	23-1352204	501(C)(3)	70,001.	0.			PARTNER AGENCY INVESTMENTS: STREET MEDICINE; ONE-TIME GRANT: LIGHTHOUSE WOMEN &
READING PUBLIC LIBRARY 100 SOUTH FIFTH STREET READING, PA 19602	23-1628407	501(C)(3)	26,100.	0.			READY SET READ SUMMER LEARNING GRANT; ONE-TIME GRANT: EARLY LITERACY PROGRAM
READING SCHOOL DISTRICT 800 WASHINGTON STREET READING, PA 19601	23-6004134		16,750.	0.			READY SET READ SUMMER LEARNING GRANTS: SUMMER GRANT PROGRAMS
SAFE BERKS 255 CHESTNUT ST READING, PA 19602	23-2087191	501(C)(3)	206,868.	0.			PARTNER AGENCY INVESTMENTS: CRISIS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SALVATION ARMY: SERVICE EXTENSION UNITS - 701 BROAD STREET - PHILADELPHIA, PA 19123	13-5562351	501(C)(3)	66,864.	0.			PARTNER AGENCY INVESTMENTS: COMMUNITY WELFARE
THE CAMEL PROJECT PO BOX 4544 READING, PA 19606	82-4345072	501(C)(3)	6,000.	0.			LIVE UNITED GRANT: PROGRAM AND TRAINING SUPPORT; ONE-TIME GRANT: FAMILY SCIENCE NIGHT
THE FOOD TRUST 1617 JOHN F KENNEDY BLVD, SUITE 900 PHILADELPHIA, PA 19103	23-2678383	501(C)(3)	7,400.	0.			ONE-TIME GRANT: HEALTHY CORNER STORE INITIATIVE
THE LGBT CENTER OF GREATER READING 1501 N 13TH STREET READING, PA 19604	81-3191097	501(C)(3)	154,800.	0.			HEALTH FOCUSED GRANT: MIND BODY SENSORY HEALTH PROGRAM
THE OUTREACH PROGRAM 301 CENTER STREET UNION, IA 50258	20-0636360	501(C)(3)	78,750.	0.			ONE-TIME INVESTMENT GRANT: FOOD INSECURITY
THE RUDDEN FAMILY FOUNDATION, INC. 16 PACIFIC AVENUE READING, PA 19608	45-5067319	501(C)(3)	25,000.	0.			ONE-TIME GRANT: TRUCKING & LABOR COSTS FOR SERVICES
THE SALVATION ARMY OF READING CORPS - PO BOX 1099 - READING, PA 19602	13-5562351	501(C)(3)	295,470.	0.			PARTNER AGENCY INVESTMENTS: LEARNING CENTER, SUPPORTIVE HOUSING, FAMILY SERVICES
THRESHOLD REHABILITATION SERVICES, INC. - 1000 LANCASTER AVENUE - READING, PA 19607	23-1681448	501(C)(3)	150,079.	0.			PARTNER AGENCY INVESTMENTS: EMPLOYMENT SERVICES
TOWER HEALTH AT HOME BERKS 1170 BERKSHIRE BOULEVARD WYOMISSING, PA 19610	23-1466250	501(C)(3)	316,650.	0.			PARTNER AGENCY INVESTMENTS: SKILLED NURSING & RELATED SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED LABOR COUNCIL OF READING & BERKS COUNTY - 65 FURNACE STREET - ROBESONIA, PA 19551	23-2962223	501(C)(3)	102,619.	0.			PROGRAM FUNDING INVESTMENTS
UNITED WAY OF LANCASTER COUNTY 1910 HARRINGTON DR, SUITE A LANCASTER, PA 17601	23-1352093	501(C)(3)	59,583.	0.			SUBCONTRACTED GRANTS: PA 211 CALL CENTER
YMCA OF READING & BERKS COUNTY 631 WASHINGTON STREET READING, PA 19603	23-1244009	501(C)(3)	527,828.	0.			PARTNER AGENCY INVESTMENTS: CHILD CARE/HEALTHY YOUTH, TRANSITIONAL HOUSING,
YOCUM INSTITUTE FOR ARTS EDUCATION 3000 PENN AVE WYOMISSING, PA 19609	23-1365985	501(C)(3)	43,000.	0.			SUBCONTRACTED GRANTS: NEIGHBORHOOD BRIDGES; RAPID RESPONSE GRANT: NEIGHBORHOOD BRIDGES

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 non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance

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

PART I, LINE 2:

UNITED WAY JUDICIOUSLY DISTRIBUTES DOLLARS DONATED IN SUPPORT OF THE
 COMMUNITY'S HEALTH AND HUMAN SERVICES NEEDS, PRIMARILY TO AND THROUGH THE
 PARTNER AGENCIES. ALSO INCLUDED IS THE DAY-TO-DAY SUPPORT AND ASSISTANCE
 PROVIDED TO THE PARTNER AGENCIES THROUGH SPECIAL AND ROUTINE AGENCY
 RELATIONS' ACTIVITIES. IN 2023, WE ALLOCATED FUNDS TO 33 AGENCY PARTNERS,
 SUPPORTING OVER 50 PROGRAMS AND SERVICES. IN TOTAL, MORE THAN 190,000 BERKS
 COUNTIANS RECEIVED UNITED WAY-FUNDED SERVICES.

Part IV Supplemental Information

UNITED WAY CONTINUES ITS EMPHASIS ON COMPLIANCE AND ACCOUNTABILITY PROCEDURES TO ENSURE THE EFFECTIVE AND EFFICIENT OPERATION OF UNITED WAY PARTNER PROGRAMS.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT:

CATHOLIC CHARITIES, DIOCESE OF ALLENTOWN

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: CASE MANAGEMENT/COUNSELING FOR VETERANS & FAMILIES; ONE-TIME GRANT: FOOD PANTRY

NAME OF ORGANIZATION OR GOVERNMENT: CONNECTIONS WORK

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: PRISONER REENTRY SERVICES; WORKFORCE DEVELOPMENT FOCUSED GRANT: REENTRY WORKS

NAME OF ORGANIZATION OR GOVERNMENT: EASTER SEALS EASTERN PENNSYLVANIA

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: PEDIATRIC CLINICS, OUTPATIENT THERAPY, THERAPEUTIC RECREATION; ONE-TIME GRANT: CONTRACTED SERVICES

NAME OF ORGANIZATION OR GOVERNMENT: FAMILY GUIDANCE CENTER

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: COUNSELING; COVID RESPONSE GRANT: PART-TIME PHYSICIAN POSITION

NAME OF ORGANIZATION OR GOVERNMENT:

GREATER READING MENTAL HEALTH ALLIANCE

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: ADVOCACY & SUPPORT GROUPS; COVID RESPONSE GRANT: EDUCATIONAL ADVOCACY PROGRAM

Part IV Supplemental Information

NAME OF ORGANIZATION OR GOVERNMENT: OPPORTUNITY HOUSE

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: CHILDCARE, EMERGENCY SHELTER; ONE-TIME GRANT: TECHNOLOGY SUPPORT; SUMMER READING GRANT

NAME OF ORGANIZATION OR GOVERNMENT: PENN STATE HEALTH - ST. JOSEPH'S

(H) PURPOSE OF GRANT OR ASSISTANCE: ONE TIME GRANT: VEGGIE RX & HEALTHY FOOD ACCESS; HEALTH FOCUSED GRANT: VEGGIE RX EXPANSION & URBAN FARM STAND

NAME OF ORGANIZATION OR GOVERNMENT: READING AREA COMMUNITY COLLEGE

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: BILINGUAL ESL PROGRAM; WORKFORCE DEVELOPMENT FOCUSED GRANT: GATEWAY TO THE WORKPLACE

NAME OF ORGANIZATION OR GOVERNMENT: READING HOSPITAL/TOWER HEALTH

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: STREET MEDICINE; ONE-TIME GRANT: LIGHTHOUSE WOMEN & CHILDREN'S CENTER

NAME OF ORGANIZATION OR GOVERNMENT: YMCA OF READING & BERKS COUNTY

(H) PURPOSE OF GRANT OR ASSISTANCE: PARTNER AGENCY INVESTMENTS: CHILD CARE/HEALTHY YOUTH, TRANSITIONAL HOUSING, BABY UNIVERSITY

NAME OF ORGANIZATION OR GOVERNMENT: YOCUM INSTITUTE FOR ARTS EDUCATION

(H) PURPOSE OF GRANT OR ASSISTANCE: SUBCONTRACTED GRANTS: NEIGHBORHOOD BRIDGES; RAPID RESPONSE GRANT: NEIGHBORHOOD BRIDGES EXPANSION

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization **UNITED WAY OF BERKS COUNTY, INC.** Employer identification number **23-165375**

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 indemnification 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 (such as 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, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the 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 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 checked="" 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 section 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 on 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		<input checked="" type="checkbox"/>
4b		<input checked="" type="checkbox"/>
4c		<input checked="" type="checkbox"/>
5a		<input checked="" type="checkbox"/>
5b		<input checked="" type="checkbox"/>
6a		<input checked="" type="checkbox"/>
6b		<input checked="" type="checkbox"/>
7		<input checked="" type="checkbox"/>
8		<input checked="" type="checkbox"/>
9		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2023

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) TAMMY L. WHITE PRESIDENT	(i)	183,028.	0.	0.	8,326.	13,727.	205,081.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
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	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

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.

PART I, LINE 3:

EXECUTIVE COMPENSATION PROCEDURES:

UNITED WAY OF BERKS COUNTY'S PRIMARY OBJECTIVE IS TO PROVIDE A REASONABLE AND COMPETITIVE EXECUTIVE COMPENSATION OPPORTUNITY CONSISTENT WITH COMPENSATION PRACTICES FOR INDIVIDUALS POSSESSING THE EXPERIENCE AND SKILLS NEEDED TO IMPROVE THE OVERALL PERFORMANCE OF THE ORGANIZATION.

THE ORGANIZATION'S EXECUTIVE COMPENSATION PHILOSOPHY IS DESIGNED TO:

- ENCOURAGE THE ATTRACTION AND RETENTION OF A HIGH CALIBER EXECUTIVE
- REINFORCE THE GOALS FOR THE ORGANIZATION BY SUPPORTING TEAMWORK AND COLLABORATION
- ENSURE THAT PAY IS PERCEIVED TO BE FAIR AND EQUITABLE
- BE FLEXIBLE TO REWARD INDIVIDUAL ACCOMPLISHMENTS AS WELL AS ORGANIZATIONAL SUCCESS
- ENSURE THAT THE PROGRAM IS EASY TO EXPLAIN, UNDERSTAND AND ADMINISTER
- BALANCE THE NEED TO BE COMPETITIVE WITH THE LIMITS OF AVAILABLE

FINANCIAL RESOURCES

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.

THE CHAIRPERSON OF THE BOARD LEADS THE BOARD OF DIRECTORS IN THE EVALUATION OF THE PRESIDENT'S PERFORMANCE ON AN ANNUAL BASIS. THE PRESIDENT PRESENTS TO THE CHAIRPERSON INFORMATION ON THE ACCOMPLISHMENTS OF THE ORGANIZATION AND ITS PROGRESS TOWARD ACHIEVING THE GOALS OUTLINED IN THE STRATEGIC PLAN, THE FULFILLMENT OF HIS/HER DUTIES AND RESPONSIBILITIES AS OUTLINED IN THE POSITION DESCRIPTION, AND THE MANNER IN WHICH THE CHALLENGES OF THE ORGANIZATION HAVE BEEN ADDRESSED AND THE OPPORTUNITIES TAKEN. THE PRESIDENT ALSO DEFINES AND DISCUSSES CURRENT AND FUTURE ORGANIZATIONAL CHALLENGES AND OPPORTUNITIES. THIS INFORMATION IS SHARED WITH THE BOARD OF DIRECTORS.

IN ADDITION TO THE ANNUAL REVIEW, A PRESIDENT'S EVALUATION SURVEY IS CONDUCTED ON A BIENNIAL BASIS WITH FULL BOARD PARTICIPATION, THE RESULTS OF WHICH ARE COMPILED AND ANALYZED BY A THIRD-PARTY PROVIDER HAVING NO VESTED INTEREST IN THE OUTCOME OF THIS PROCESS. A FORMAL REPORT IS PRESENTED BY THE PROVIDER FIRST TO THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS FOR INITIAL DISCUSSION, THEN TO THE FULL BOARD OF DIRECTORS AS PART OF AN EXECUTIVE SESSION.

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.

FOLLOWING THIS SESSION, THE CHAIRPERSON MEETS WITH THE PRESIDENT AND SHARES THE RESULTS OF THE GROUP EVALUATION AS WELL AS ANY GOALS OR SUGGESTIONS THE BOARD HAS RELATIVE TO THE INFORMATION PRESENTED AND THE FUTURE DIRECTION OF THE ORGANIZATION. THE CHAIRPERSON OF THE BOARD COMMUNICATES THE RESULTS OF THE ASSESSMENT VERBALLY TO THE PRESIDENT AND THE INFORMATION IS CAPTURED THROUGH THE MINUTES OF THE EXECUTIVE SESSIONS FOR EXECUTIVE COMMITTEE AND THE BOARD OF DIRECTORS. THE RESULTS OF THE ASSESSMENT ARE INCLUDED IN THE PRESIDENT'S PERSONNEL FILE.

THE LEVEL AND FORM OF COMPENSATION IS DETERMINED FOLLOWING A REVIEW OF LOCAL COMPENSATION LEVELS OF CEO'S OF ORGANIZATIONS OF SIMILAR SIZE AND SCOPE, AS WELL AS THE COMPENSATION LEVELS OF CEO'S OF UNITED WAY ORGANIZATIONS OF SIMILAR SIZE AND SCOPE. WHILE UNITED WAY FOCUSES ON OTHER UNITED WAYS AND NONPROFITS TO BENCHMARK COMPENSATION, THE ORGANIZATION UNDERSTANDS THAT THE MARKET FOR EXECUTIVE TALENT MAY BE BROADER THAN THE GROUP OF CHARITIES. MARKET INFORMATION FROM ADDITIONAL MARKET SEGMENTS AND PUBLISHED NOT-FOR-PROFIT COMPENSATION SURVEYS, MAY BE USED AS A SUPPLEMENT. THE PRESIDENT'S ANNUAL COMPENSATION IS COMMUNICATED BOTH VERBALLY AND IN WRITING TO THE PRESIDENT AND IS INCLUDED IN HIS/HER

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.

PERSONNEL FILE.

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2023

Open to Public Inspection

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
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 **UNITED WAY OF BERKS COUNTY, INC.** Employer identification number **23-1655375**

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	28	391,243.	FAIR VALUE
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ()				
26 Other ()				
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement **29**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2023

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Multiple horizontal lines for supplemental information.

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

FORM 990, PART III, LINE 3, CHANGES IN PROGRAM SERVICES:

OAKBROOK COLLECTIVE IMPACT COUNCIL (OCIC)

BEGINNING IN 2018, UNITED WAY OF BERKS COUNTY FORMED THE OAKBROOK

COLLECTIVE IMPACT COUNCIL (OCIC). THE OCIC CONSISTED OF INDIVIDUALS

REPRESENTING VARIOUS NONPROFITS, EDUCATION PARTNERS, THE CORPORATE

SECTOR, AND OAKBROOK RESIDENTS. USING THE COLLECTIVE IMPACT MODEL,

COMMUNITY PARTNERS WORKED TOGETHER TO ADDRESS NEEDS INDEMNIFIED BY

RESIDENTS: FOOD ACCESS AND TO EDUCATE AND CONNECT OAKBROOK RESIDENTS

WITH COMMUNITY RESOURCES. THIS WAS A MULTI-YEAR PROCESS, WHERE THE

GROUP LOOKED TO ADDRESS THE ROOT CAUSE OF AN ISSUE AND CREATE POSITIVE

CHANGE. ONGOING RESIDENT ENGAGEMENT THROUGH DOOR-TO-DOOR SURVEYS AND

COMMUNITY CONVERSATIONS WERE PART OF THE PROCESS. THROUGH THIS RESIDENT

FEEDBACK, READING HOUSE AUTHORITY ANNOUNCED THEY ARE BUILDING THE

OAKBROOK CENTER FOR COMMUNITY SERVICES TO MEET SEVERAL OF THE NEEDS

IDENTIFIED BY RESIDENTS INCLUDING A FOOD PANTRY, SPACE FOR COMMUNITY

MEETINGS AND CLASSES, A CHILDCARE CENTER AND A COMMUNITY RESOURCE

CENTER. AS A RESULT, AFTER FIVE YEARS, OCIC EFFORTS WRAPPED AT THE

BEGINNING OF 2023, AS READING HOUSING AUTHORITY CONTINUES THE WORK.

SEVERAL ONGOING EFFORTS CONTINUED IN 2023 AS A RESULT OF OCIC INCLUDING

BERKS COMMUNITY HEALTH CENTER'S OAKBROOK OUTREACH SPECIALIST CONTINUING

TO CONNECT AND ENGAGE WITH OAKBROOK RESIDENTS, ESL CLASSES, GIRLS ON

THE RUN (GOTR), OAKBROOK LOCATED ART SESSIONS (OLAS) AND THE OAKBROOK

COMMUNITY GARDEN, WHICH HAS BECOME A HUB OF ACTIVITY DURING THE SUMMER

MONTHS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2023

LHA 332211 11-14-23

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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DURING 2023, UWBC INVESTED FUNDING IN 51 PROGRAMS DELIVERED BY 33 AGENCY AND 5 CONTRACTED PARTNERS, AS WELL AS SUPPORTED COMMUNITY INITIATIVES AND PROVIDED VARIOUS ONE-TIME GRANTS. ALL PROGRAMS IN WHICH UWBC INVESTS IN ANNUALLY ARE EVALUATED BY OUR COMMUNITY IMPACT CABINET, FOCUS AREA PANELS (FAP) AND COMPLIANCE REVIEWERS, REPRESENTING 50 VOLUNTEER COMMUNITY MEMBERS FROM VARIOUS SECTORS. THESE VOLUNTEERS DEDICATE INVALUABLE TIME TO ENSURE UWBC DOLLARS ARE INVESTED IN HIGH-PRIORITY PROGRAMS THAT ADDRESS CRITICAL CURRENT COMMUNITY NEEDS, AS WELL AS PROGRAMS THAT ARE HIGH-PERFORMING - CONSISTENTLY AND EFFECTIVELY DELIVERING A HIGH-QUALITY PROGRAM PRODUCING MEANINGFUL RESULTS FOR PARTICIPANTS. ANNUALLY, PROGRAMS RECEIVING UWBC INVESTMENTS ARE REQUIRED TO SUBMIT A REPORT THAT DETAILS HOW UWBC DOLLARS ARE SPENT TO SUPPORT PROGRAMMING, AND THE OUTCOMES ACHIEVED BY CLIENTS. THESE OUTCOMES PLAY A CRUCIAL ROLE IN DETERMINING THE EFFECTIVENESS OF UWBC INVESTMENTS IN PROGRAMS. IN ADDITION TO THE PROGRAMS OUTLINED BELOW, YOU CAN READ MORE ABOUT THE UWBC'S VARIOUS 2023 GRANT RECIPIENTS AS REPORTED ON SCHEDULE I.

UWBC INVESTED IN THE FOLLOWING PROGRAMS IN 2023:

EDUCATION FOCUS AREA

UNITED WAY BELIEVES THAT EVERYONE CAN PLAY A ROLE IN ENSURING THAT CHILDREN GROW UP TO BE PRODUCTIVE CITIZENS AND MEMBERS OF OUR COMMUNITY. THIS BEGINS WITH A GOOD EDUCATION THAT IS THE FOUNDATION FOR A CHILD'S SUCCESS IN WORK AND LIFE, ALONG WITH PROVIDING SUPPORTIVE PROGRAMMING THAT HELPS YOUTH DEVELOP NECESSARY SKILLS FOR THEIR FUTURES. TO MEET THIS GOAL, KEY ISSUES ADDRESSED BY UWBC AND ITS SUPPORTED PROGRAMS IN THIS FOCUS AREA INCLUDE EARLY CHILDHOOD CARE,

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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SCHOOL READINESS, SCHOOL SUCCESS, AND POSITIVE YOUTH DEVELOPMENT, SINCE THESE ISSUES ARE ALL INTERTWINED IN HELPING CHILDREN ACHIEVE THEIR POTENTIAL. THESE PROGRAMS IMPACTED OVER 24,800 CHILDREN AND YOUTH IN BERKS COUNTY IN 2023.

EARLY CARE AND SCHOOL READINESS

- COMMUNITY-LEVEL OUTCOME: FAMILIES HAVE ACCESS TO AFFORDABLE AND QUALITY EARLY LEARNING EXPERIENCES THAT RESULT IN KINDERGARTEN READINESS.

-- COMMUNITY SERVICES FOR CHILDREN, INC. IS A LEADER IN PROVIDING THE HIGHEST QUALITY EARLY CHILDHOOD EDUCATION AND FAMILY SERVICES FOR ECONOMICALLY DISADVANTAGED FAMILIES. AS PARENTS ARE CONTINUING TO RETURN TO THE WORKFORCE, CHILDCARE IS A GREATER NEED THAN EVER ACROSS THE COUNTY, STATE AND COUNTRY. SUPPORTING FAMILIES IN CHOOSING AND AFFORDING QUALITY CHILDCARE IS ONE OF THE MAIN FUNCTIONS OF THE EARLY LEARNING RESOURCE CENTER. WHILE SUPPORT AROUND CHILDCARE CONTINUES TO BE A GREAT NEED IN THE COMMUNITY, THE AVAILABILITY OF CHILD CARE WORKS (CCW) DOLLARS SUPPORTED BY UNITED WAY HAS MEANT THAT THERE IS CURRENTLY NO WAITING LIST FOR FUNDING. THE FOCUS HAS BEEN ON SUPPORTING FAMILIES IN NEED WHO DO NOT QUALIFY FOR OTHER FUNDING SOURCES TO BE ABLE TO HAVE ACCESS TO CHILDCARE.

-- OPPORTUNITY HOUSE, CHILDCARE: THE SECOND STREET LEARNING CENTER IS A COMPREHENSIVE COMMUNITY CHILDCARE PROGRAM FOR CHILDREN AGES 6 WEEKS TO 13 YEARS FOCUSING ON CREATIVITY, SOCIALIZATION, AND THE DEVELOPMENT OF HIGH SELF-ESTEEM. ACTIVITIES ARE DESIGNED TO MEET THE NEEDS OF EACH INDIVIDUAL CHILD. MULTI-CULTURAL AND DEVELOPMENTALLY APPROPRIATE MATERIALS AND EQUIPMENT ARE OFFERED.

--YMCA OF READING & BERKS COUNTY, CHILDCARE: OFFERS A

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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SCIENTIFICALLY-BASED, IMPLEMENTED EARLY CHILDHOOD CURRICULUM THAT ALIGNS WITH THE PENNSYLVANIA LEARNING STANDARDS FOR EARLY CHILDHOOD. SINCE PLAY IS THE FOUNDATION FOR YOUNG CHILDREN'S LEARNING AND DEVELOPMENT, THE YMCA PROVIDES WELL-EQUIPPED AND CAREFULLY ARRANGED CLASSROOMS.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS GAIN KNOWLEDGE AND DEVELOP SKILLS TO ESTABLISH STRONG FAMILIES AND HELP CHILDREN REACH THEIR POTENTIAL.

-- CENTRO HISPANO, ABRIENDO PUERTAS/OPENING DOORS PROGRAM: AN EVIDENCE-BASED, COMPREHENSIVE TRAINING PROGRAM, DEVELOPED BY AND FOR LATINO PARENTS WITH CHILDREN AGES 0 TO 5; AIMS TO IMPROVE THE OUTCOMES OF THE NATION'S LATINO CHILDREN BY BUILDING THE CAPACITY AND CONFIDENCE OF PARENTS TO BE STRONG AND POWERFUL ADVOCATES IN THEIR CHILDREN'S LIVES. IN 2023, STAFF WENT THROUGH THE NATIONAL TRAINING TO TRANSITION TO VIRTUAL PROGRAMMING WHICH ELIMINATED BARRIERS FOR PARENTS TO PARTICIPATE INCLUDING TRANSPORTATION. THIS PROGRAM ALSO ALIGNS WITH UWBC'S READY.SET.READ! INITIATIVE.

-- YMCA OF READING & BERKS COUNTY, BABY UNIVERSITY: OFFERED AS A 6-WEEK SESSION, EACH PARTICIPANT, A PARENT OR CAREGIVER WITH A CHILD FROM PRENATAL TO FIVE YEARS OLD, RECEIVES A WEEKLY HOME VISIT IN ADDITION TO THE WEEKLY CLASSROOM INSTRUCTION, WHICH INCLUDES EDUCATION ON EARLY CHILDHOOD DEVELOPMENT AND EVIDENCE-BASED PARENTING CURRICULUM.

SCHOOL SUCCESS

- COMMUNITY-LEVEL OUTCOME: STUDENTS WILL ACHIEVE ACADEMIC SUCCESS BY IMPROVED ATTENDANCE AND/OR PROMOTION TO THE NEXT GRADE LEVEL.

-- BIG BROTHERS BIG SISTERS OF BERKS COUNTY, MENTORING PROGRAM SERVICES: THEIR MISSION IS TO PROVIDE CHILDREN FACING ADVERSITY WITH

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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STRONG AND ENDURING, PROFESSIONALLY SUPPORTED 1-TO-1 RELATIONSHIPS THAT CHANGE THEIR LIVES FOR THE BETTER, FOREVER. THIS IS ACHIEVED THROUGH PROFESSIONALLY-DIRECTED MENTORING PROGRAMS UTILIZING CAREFULLY SCREENED AND TRAINED VOLUNTEERS, AND INCLUDES ONE-TO-ONE PROGRAM, COUL (THE CLUB OF UNMATCHED LITTLES) GROUP-MENTORING, TEEN PROGRAM THAT PROVIDES GROUP-MENTORING, AND SMART (STUDENTS & MENTORS ACHIEVING RESULTS TOGETHER), A SCHOOL-BASED PROGRAM.

- COMMUNITY-LEVEL OUTCOME: STUDENTS WILL PARTICIPATE IN EDUCATIONAL EXPERIENCES DURING THE SUMMER TO MAINTAIN READING SKILLS.

-- BIRDSBORO COMMUNITY MEMORIAL CENTER, OUT OF SCHOOL EDUCATION PROGRAMS: THE SUMMER READING PROGRAM FOR YOUTH IN GRADES FIRST THROUGH SIXTH ALLOWS PARTICIPANTS TO PRACTICE AND LEARN NEW STRATEGIES THAT WILL ASSIST THEM IN MAINTAINING CURRENT READING LEVELS, OR INCREASE LEVELS, THROUGHOUT THE SUMMER MONTHS.

-- OLIVET BOYS AND GIRLS CLUB OF READING AND BERKS COUNTY, COMPREHENSIVE YOUTH DEVELOPMENT: OLIVET SUMMER CAMP PROGRAMS PICK UP WHEN THE AFTER-SCHOOL PROGRAM ENDS, KEEPING YOUTH ENGAGED IN PROGRAMS DURING THE SUMMER MONTHS.

-- READY.SET.READ!: UNITED WAY PROVIDES SUMMER LEARNING GRANTS TO PARTNER SCHOOLS, SUMMER LEARNING COALITION MEMBERS, AND OTHER ORGANIZATIONS SERVING BERKS COUNTY STUDENTS. THE PROGRAM IS DESIGNED TO PROVIDE SMALL GRANTS IN SUPPORT OF SUMMER LEARNING PROGRAMMING FOR STUDENTS UP TO AND INCLUDING 3RD GRADE. FOLLOWING A THOROUGH REVIEW PROCESS, THE COMMITTEE APPROVED 12 PROGRAMS FOR A TOTAL FUNDING OF \$52,850. THESE GRANTS IMPACTED 1,668 STUDENTS DURING THE SUMMER OF 2023.

-- THE SALVATION ARMY READING CORPS LEARNING CENTER: A SUMMER DAY CAMP IS OFFERED FOR YOUTH IN THE SOUTHSIDE OF PENN NEIGHBORHOOD. THEY ARE

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-165375
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PROVIDED BREAKFAST AND THEN ENJOY A DAY OF FUN INCLUDING EDUCATIONAL GAMES AND ACTIVITIES, CHARACTER DEVELOPMENT SKILLS, AND A WEEKLY FIELD TRIP. SNACKS ARE PROVIDED THROUGHOUT THE DAY AND LUNCH AND DINNER ARE PROVIDED.

YOUTH DEVELOPMENT

- COMMUNITY-LEVEL OUTCOME: BY PARTICIPATING IN DIVERSE, SAFE, AND EFFECTIVE OUT-OF-SCHOOL TIME PROGRAMS, YOUTH WILL DEVELOP ACADEMIC, ARTISTIC, AND/OR LEADERSHIP SKILLS.

-- BIRDSBORO COMMUNITY MEMORIAL CENTER, OUT OF SCHOOL EDUCATION PROGRAMS: LITERACY PROGRAMS OFFERED AS PART OF THE AFTER-SCHOOL CLUBHOUSE, WHICH ENGAGES STUDENTS, GRADES 1-6. STAFF ASSIST STUDENTS WITH HOMEWORK AND READING SUPPORT. THE PROGRAM ALSO ENCOMPASSES SOCIAL ACTIVITIES.

-- GIRL SCOUTS OF EASTERN PA, OUTREACH TO AT-RISK GIRLS: GIRLS IN FUNDED INITIATIVES PROGRAMS PROVIDE HIGH-QUALITY OUT-OF-SCHOOL-TIME THROUGH EDUCATION OPPORTUNITIES FOR GIRLS IN UNDERSERVED COMMUNITIES IN THE CITY OF READING. GIRLS ATTEND WEEKLY MEETINGS AT CONVENIENT COMMUNITY LOCATIONS BOTH DURING THE SCHOOL YEAR AND IN THE SUMMER.

-- HAWK MOUNTAIN COUNCIL BOY SCOUTS OF AMERICA, TRADITIONAL SCOUTING: THIS PROGRAM OPERATES WITHIN THE LOCAL NEIGHBORHOOD AT LOCATIONS PROVIDED BY PARTNERSHIPS THAT HAVE A CONTINUED INTEREST IN CITIZENSHIP TRAINING, PERSONAL FITNESS, AND CHARACTER DEVELOPMENT. ADULT VOLUNTEERS ADMINISTER THE PROGRAMS AT ALL LEVELS WITH SUPPORT FROM THE HAWK MOUNTAIN COUNCIL. THE LEVEL OF YOUTH LEADERSHIP IS BASED UPON AGE APPROPRIATE ACTIVITIES.

-- HAWK MOUNTAIN COUNCIL BOY SCOUTS OF AMERICA, URBAN SCOUTING:

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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SCOUTREACH IS THE HAWK MOUNTAIN COUNCIL'S COMMITMENT TO ENSURING ALL YOUNG PEOPLE HAVE AN OPPORTUNITY TO JOIN SCOUTING, REGARDLESS OF THEIR CIRCUMSTANCES, NEIGHBORHOOD, OR CULTURAL OR ETHNIC BACKGROUND.

SCOUTREACH IS THE SAME PROGRAM AS SCOUTING IN ANY OTHER AREA BUT IS TYPICALLY AN AFTER-SCHOOL PROGRAM THAT PROVIDES AN ADDITIONAL EMPHASIS ON SPECIAL NEEDS OF PARTICIPANTS, SUCH AS PARENTAL INVOLVEMENT, FINANCIAL ABILITY, ACADEMIC PERFORMANCE, ACCESS TO TECHNOLOGY AND CULTURAL AND LANGUAGE DIFFERENCES. UWBC PROVIDED AN INCREASED INVESTMENT TO ASSIST WITH PILOTING THE NEW STEM SCOUTS WITHIN THE CITY OF READING. THIS VALUES-BASED PROGRAM FOCUSES ON SCHOOL SUCCESS AND YOUTH DEVELOPMENT. STEM SCOUTS EXPANDS BOY SCOUTING OPPORTUNITIES TO GIRLS. SCOUTS SPEND 90 MINUTES PER MEETING WORKING ON SELF-IMPROVEMENT, CRITICAL THINKING, AND HANDS ON EXPERIMENTATION FOCUSING ON TOPICS SUCH AS PHYSICS OF LIGHT, PROPERTIES OF MATTER, MAGNETISM, PROPERTIES OF SOUND, ROBOTICS, ARCHAEOLOGY, AND SPACE.

-- OLIVET BOYS AND GIRLS CLUB OF READING AND BERKS COUNTY, COMPREHENSIVE YOUTH DEVELOPMENT: DURING THE SCHOOL YEAR KIDS ATTEND THEIR CLUBS MONDAY THROUGH FRIDAY AND PARTICIPATE IN MANY ACTIVITIES AND PROGRAMS THAT ENRICH THEIR LIVES AND HELP MAKE THEM SUCCESSFUL STUDENTS, ATHLETES, AND CITIZENS. MEMBERS AGES 6-12 PARTICIPATE FROM 2:30-6 P.M. MEMBERS 13 AND OLDER UTILIZE THE CLUBS FROM 6-9 P.M. THESE PROGRAMS INCLUDE TUTORING, ARTS AND CRAFTS, SPORTS AND RECREATION, COMPUTER AND TECHNOLOGY, LEADERSHIP AND CHARACTER BUILDING, COLLEGE ACCESS AND CAREER DEVELOPMENT, AND VISUAL AND PERFORMING ARTS.

-- THE SALVATION ARMY READING CORPS LEARNING CENTER: AN AFTER-SCHOOL PROGRAM IS AVAILABLE FOR CHILDREN IN THE SOUTH OF PENN NEIGHBORHOOD, WHERE THERE ARE LIMITED OPPORTUNITIES FOR YOUTH. CHILDREN ARE ABLE TO ATTEND RIGHT AFTER SCHOOL UNTIL 5 P.M. THEY ARE PROVIDED SNACKS,

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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RECEIVE TUTORING, HELP WITH HOMEWORK ASSIGNMENTS, AND CAN PARTICIPATE IN ARTS AND CRAFTS, PLAY GAMES IN THE GYM, READ BOOKS, WORK OUT, COMPLETE PUZZLES, AND HAVE DINNER BEFORE HEADING HOME.

EDUCATIONAL CASE MANAGEMENT

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS RECEIVE CASE MANAGEMENT TO IMPROVE THEIR LIVES.

-- COMMUNITIES IN SCHOOLS (CIS), INTEGRATED STUDENT SUPPORT: THE CIS MODEL OF INTEGRATED STUDENT SUPPORT OPERATES THROUGH THE COORDINATION AND DELIVERY OF SCHOOL-WIDE SUPPORTS, GROUP-LEVEL SUPPORTS, AND INDIVIDUALIZED SUPPORTS FOCUSING ON IMPROVING ATTENDANCE, BEHAVIOR, AND ACADEMIC PERFORMANCE. AT THE READING INTERMEDIATE HIGH SCHOOL, CIS IS WORKING TO ESTABLISH AND STRENGTHEN RELATIONSHIPS WITH STUDENTS, FAMILIES, SCHOOL DISTRICT STAFF, AND COMMUNITY PARTNERS.

LITERACY

- COMMUNITY-LEVEL OUTCOME: STUDENTS IMPROVE MEANING-BASED LITERACY SKILLS. MEANING-BASED SKILLS INCLUDE ORAL LANGUAGE (VOCABULARY AND WORD KNOWLEDGE), TEXT CHARACTERISTICS, UNDERSTANDING OF PURPOSE, INTEREST, MOTIVATION AND RELEVANT BACKGROUND KNOWLEDGE.

READY.SET.READ!

THIRD GRADE READING PROFICIENCY IS A KEY INDICATOR OF FUTURE SUCCESS, YET RECENT PSSA SCORES SHOW THAT A HIGH PERCENT OF THIRD GRADERS IN BERKS COUNTY FALL SHORT OF BEING PROFICIENT. LAUNCHED IN 2012, READY.SET.READ! (RSR) IS A COLLABORATION AMONG UNITED WAY OF BERKS COUNTY, THE EDUCATIONAL AND BUSINESS COMMUNITIES, AND COMMUNITY ORGANIZATIONS WORKING TO IMPROVE READING PROFICIENCY FOR STUDENTS BY

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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THE END OF THIRD GRADE. THE COLLECTIVE WORK FOCUSES ON FOUR KEY STRATEGIES: IMPLEMENT SCHOOL-READINESS ACTIVITIES FOR PRE-SCHOOL CHILDREN TO SUPPORT LANGUAGE AND PRE-LITERACY DEVELOPMENT IN YOUNG CHILDREN, CONNECT TUTORS WITH EARLY GRADE STUDENTS NEEDING SUPPLEMENTAL INSTRUCTION, ENGAGE PARENTS TO PROMOTE LITERACY AND MOBILIZE THE COMMUNITY AROUND THIS WORK.

RSR 2023 PROGRAM OVERVIEW:

- HISTORICALLY, STAR READERS HAS PROVIDED TUTORING TO 35 ELEMENTARY SCHOOLS IN 14 SCHOOL DISTRICTS AND SERVED OVER 300 STUDENTS IN FIRST AND SECOND GRADE BUT HAS CONTINUED TO RECOVER FROM THE IMPACTS OF THE PANDEMIC. IN THE 2022-2023 SCHOOL YEAR STAR READERS PROVIDED TUTORING TO 29 ELEMENTARY SCHOOLS IN 13 SCHOOL DISTRICTS AND WAS DELIVERED BY 250 VOLUNTEER TUTORS SERVING 260 STUDENTS IN FIRST AND SECOND GRADES.

- GROWING READERS: LATINO-OWNED CHILDCARE CENTERS IN THE CITY OF READING RECEIVE COACHING AND MENTORING SERVICES ALONG WITH CURRICULUM SUPPORT TO ENHANCE LITERACY DEVELOPMENT FOR THEIR STUDENTS. GROWING READERS ALSO OFFERS A PROFESSIONAL DEVELOPMENT PROGRAM TO ASSIST CHILDCARE TEACHERS IN OBTAINING THEIR CHILD DEVELOPMENT ASSOCIATE CREDENTIAL (CDA) THROUGH A PARTNERSHIP WITH READING AREA COMMUNITY COLLEGE. IN 2023, 18 CANDIDATES COMPLETED THE EDUCATION PORTION OF THE PROGRAM. THERE WERE NO CDAS EARNED IN 2023 DUE TO STATE BUDGET DELAYS FOR THE CDA VOUCHER PROGRAM AND LIMITED ACCESS TO PROFESSIONAL DEVELOPMENT SPECIALISTS FOR VERIFICATION EVALUATIONS FROM THE COUNCIL FOR PROFESSIONAL DEVELOPMENT WHO ISSUES THE CDA CREDENTIAL. THESE ISSUES WERE RESOLVED IN DECEMBER 2023 ALLOWING SIX INDIVIDUALS TO ENTER THE APPLICATION PROCESS TO BE COMPLETED IN EARLY 2024. ONE CDA CREDENTIALLED STUDENT GRADUATED WITH HER ASSOCIATE DEGREE IN EARLY

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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CHILDHOOD EDUCATION IN MAY 2023. ADDITIONALLY, 9 OTHER STUDENTS COMPLETED 50% OF PROGRAM REQUIREMENTS (ONE CLASS AND THE CDA APPLICATION PROCESS REMAIN TO BE COMPLETED IN 2024). UWBC WORKED WITH CANDIDATES FROM 9 CENTERS. COACHING AND MODELING WAS DELIVERED IN 2 CENTERS IN 2024: LITTLE GENIUS DAY CARE AND BABIES N MOTION. ALL TEACHERS WERE EVALUATED (PRE AND POST) USING THE EARLY LANGUAGE AND LITERACY CLASSROOM OBSERVATION (ELLCO) FOR PRESCHOOL AND THE CIRCLE CLASSROOM OBSERVATION FOR INFANT TODDLERS. ALL TEACHERS SHOWED IMPROVEMENT AFTER RECEIVING COACHING AND MODELING ALONG WITH COMPLETION OF THE EDUCATION PORTION OF GROWING READERS. THERE WERE 238 CHILDREN SERVED FOR GROWING READERS, RESULTING FROM PROFESSIONAL DEVELOPMENT OF THE TEACHERS IN 2023. OVERALL, BASED ON CHILDCARE CENTER CAPACITY, THE NUMBER OF CHILDREN BENEFITING FROM TEACHER EDUCATION AND UNITED WAY INTERVENTIONS IS 1,925.

- READ WITH ME PROVIDES A BOOK BORROWING PROGRAM TO PROMOTE HOME BOOK READING ROUTINES IN FIVE ELEMENTARY SCHOOLS AND TWO CHILDCARE CENTERS IN A TOTAL OF 41 CLASSROOMS. VOLUNTEERS AT ELEMENTARY SCHOOLS AND CHILDCARE CENTER STAFF ASSIST WITH THE IMPLEMENTATION OF THIS PROGRAM, REVIEWING AND ROTATING THE BOOK BAGS ON A WEEKLY BASIS.

- REACH OUT AND READ INCORPORATES EARLY LITERACY INTO PEDIATRIC PRACTICES, PROVIDING PARENTS CHILDREN'S BOOKS TO HELP PREPARE THEIR CHILDREN TO LEARN AND READ. A TOTAL OF 500 BOOKS WERE DISTRIBUTED TO PARTNER PEDIATRIC PRACTICES TO CHILDREN, AGES BIRTH THROUGH FIVE YEARS OLD, AT THEIR ANNUAL CHECKUP.

- SUMMER LEARNING GRANTS: THIS COMPETITIVE GRANT IS OPEN TO SCHOOLS AND ORGANIZATIONS SERVING BERKS COUNTY STUDENTS. THE GRANT PROVIDES UP TO \$5,000 IN SUPPORT OF SUMMER LEARNING PROGRAMMING. IN 2023, 12 SUMMER PROGRAMS RECEIVED GRANTS TOTALING \$52,000. THESE SUMMER PROGRAMS

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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PROVIDED OVER 1,600 CHILDREN WITH AN OPPORTUNITY TO MITIGATE SUMMER LEARNING LOSS.

- BOOKS FOR BIKES IS A SUMMER READING PROGRAM FACILITATED BY UWBC IN THE OAKBROOK HOMES COMMUNITY OF READING THROUGH PARTNERSHIPS WITH BERKS COMMUNITY HEALTH CENTER, CUSTOMERS BANK, READING HOUSING AUTHORITY, READING SCHOOL DISTRICT, ALVERNIA UNIVERSITY, SALVATION ARMY, AND YMCA READING BRANCH. IN ITS EIGHTH YEAR, OVER 250 CHILDREN SPENT AN AVERAGE OF 78 HOURS EACH ENGAGED IN LITERACY ACTIVITIES OVER A 6-10 WEEK PERIOD (PROGRAMS DIFFERED IN LENGTH) IN SUMMER 2023. OF THESE CHILDREN, 250 RECEIVED NEW BIKES AND HELMETS, COURTESY OF CUSTOMERS BANK, FOR ATTAINING AT LEAST 75% PARTICIPATION RATE IN THE BOOKS FOR BIKES PROGRAM.

- READ ALLIANCE: READ ALLIANCE IS A DUAL IMPACT PROGRAM TRAINING HIGH SCHOOL STUDENTS TO TUTOR FIRST GRADERS STRUGGLING WITH READING. AFTER PILOTING THE PROGRAM WITH ONE READING SCHOOL DISTRICT ELEMENTARY SCHOOL DURING THE 2021-2022 SCHOOL YEAR, IN 2022-2023, UWBC EXPANDED THE PROGRAM, ADDING FIVE READING SCHOOL DISTRICT ELEMENTARY SCHOOLS, WITH A TOTAL OF 6 PARTICIPATING IN THE PROGRAM. THERE WERE 132 FIRST GRADERS IN THE PROGRAM WORKING WITH 127 TEEN TUTORS. ALL FIRST GRADERS DEMONSTRATED READING GROWTH AND 76 PERCENT OF THEM MET THEIR READING GOAL. THE FIRST GRADERS GREW SOCIALLY AS WELL AS ACADEMICALLY. THEY IMPROVED THEIR READING SKILLS WHILE CREATING BONDS WITH THEIR PEERS AND TEENS IN THE PROGRAM. FOR MANY OF THE TEENS, THIS WAS THEIR FIRST PAID WORK EXPERIENCE AND PROVIDED THEM WITH THE OPPORTUNITY TO LEARN FIRST-HAND WHAT A CAREER IN EDUCATION COULD BE LIKE. THE PROGRAM RAN FOR 15 WEEKS, TUESDAY THROUGH THURSDAY FROM 3:00-4:30 P.M.

- YOCUM INSTITUTE FOR ARTS EDUCATION RECEIVED A \$25,000 INVESTMENT FROM

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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UWBC TO THE SUPPORT NEIGHBORHOOD BRIDGES, A COMPREHENSIVE PROGRAM OF STORYTELLING AND CREATIVE DRAMA THAT IS CURRICULUM-BASED AND DEVELOPS CHILDREN'S CRITICAL AND CULTURAL LITERACY, VOCABULARY, WRITING AND COMMUNICATION SKILLS. IT IS RECOGNIZED BY THE U.S. DEPARTMENT OF EDUCATION'S OFFICE OF IMPROVEMENT AND INNOVATION AS AN EFFECTIVE MODEL FOR INTEGRATING THE ARTS WITH STANDARDS-BASED EDUCATION PROGRAMS. IN 2023, YOCUM DELIVERS THE PROGRAM TO FOUR OF THE THIRD-GRADE CLASSROOMS AT 16TH & HAAK ELEMENTARY SCHOOL, READING SCHOOL DISTRICT.

- READING PUBLIC LIBRARY (RPL) RECEIVED A \$25,000 INVESTMENT TO SUPPORT ITS EARLY LITERACY PROGRAM AND THE ENDEAVORS OF THE EARLY LITERACY OUTREACH COORDINATOR. IN 2023, RPL EARLY LITERACY OUTREACH COORDAINTOR VISITED 10 CHILD CARE CENTERS AND 13 HEAD START CLASSES EACH MONTH, PROVIDING A STORY TIME WITH SONGS AND CRAFT ACTIVITIES. THE LIBRARY ALSO HOSTED TWO AUTHOR VISITS AND TWO PARENT LITERACY WORKSHIPS IN 2023 AND INCREASED THE NUMBER OF DRAMATIC PLAY STATIONS AT ALL THEIR BRANCHES. THESE STATIONS ARE HEAVILY USED AND HELP DRAW FAMILIES TO THE LIBRARY.

HARWOOD INSTITUTE FOR PUBLIC INNOVATION READING, PA, INITIATIVE SINCE JUNE 2022, UNITED WAY OF BERKS COUNTY HAS BEEN INVOLVED WITH THE HARWOOD INITIATIVE, FOCUSED ON SPURRING EDUCATION AND COMMUNITY TRANSFORMATION IN READING, PA. BASED ON THE READING THRIVING, TOGETHER REPORT - THREE MAIN FOCUSES WERE IDENTIFIED AS AREAS TO ADDRESS: EARLY CHILDHOOD EDUCATION (ECE), ESL AND AFTER SCHOOL PROGRAMS. THREE TEAMS WERE FORMED ONE FOR EACH OF THESE AREAS AND HAVE BEEN DOING WORK ON THEIR RESPECTIVE AREA. UNITED WAY LEADS THE EARLY CHILDHOOD EDUCATION (ECE) TEAM, WHOSE FOCUS IS HELPING TO BUILD AWARENESS FOR PARENTS/CAREGIVERS ABOUT THE IMPORTANCE OF A CHILD'S FIRST FIVE YEARS

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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OF DEVELOPMENT, WHILE ENGAGING AND CONNECTING THEM WITH EXPERIENCES AND ACTIVITIES FOR LITTLES ONES TO ASSIST WITH BRAIN DEVELOPMENT. THIS HELPS SET CHILDREN UP FOR SUCCESS WHEN ENTERING SCHOOL.

AS PART OF THIS WORK, OVER 20 COMMUNITY CONVERSATIONS FOCUSED ON EARLY CHILDHOOD EDUCATION WERE HELD WITH READING RESIDENTS TO LEARN ABOUT THEIR ASPIRATIONS FOR THIS COMMUNITY. WHAT WE LEARNED WAS AN OVERWHELMING SHARED ASPIRATION FOR A SAFE AND CLEAN COMMUNITY WHERE PEOPLE FEEL A SENSE OF CONNECTION TO THEIR NEIGHBORS. THE CONVERSATIONS ALSO REVEALED CONCERNS ABOUT FEELING ISOLATED, CHALLENGES WITH MENTAL HEALTH, LACK OF AFFORDABLE ACTIVITIES FOR FAMILIES, AND THE NEED FOR ADDITIONAL GUIDANCE AND SUPPORT FOR NEW PARENTS. PARTICIPANTS BELIEVE OPPORTUNITIES FOR ACTION INCLUDE MORE COMMUNITY GATHERINGS LIKE NEIGHBORHOOD BLOCK PARTIES AND MOVIE NIGHTS AND UTILIZING SCHOOLS TO HOLD FAMILY ACTIVITIES. MEMBERS OF THE ECE SHARED THIS PUBLIC KNOWLEDGE LEARNED VIA THE COMMUNITY CONVERSATIONS WITH VARIOUS GROUPS, INCLUDING READING SCHOOL DISTRICT PRINCIPALS AND ADMINISTRATORS, READING HOUSING AUTHORITY, NONPROFIT LEADERS, CHILDCARE PROVIDERS AND PARENTS.

THE ECE TEAM HAS FOCUSED OUTREACH EFFORTS ON THE NORTHEAST SECTION OF READING, IN THE NEIGHBORHOOD AROUND THE 11TH & PIKE PARK AND THE NORTHEAST BRANCH OF THE READING PUBLIC LIBRARY. ACTIVITIES INCLUDED POP-UP STORY TIME AT THE PARK TO ENGAGE WITH FAMILIES AND SHARE INFORMATION ON ECE RESOURCES. BASED ON FEEDBACK FROM THE COMMUNITY CONVERSATIONS THAT READING RESIDENTS WANT MORE COMMUNITY GATHERINGS LIKE NEIGHBORHOOD BLOCK PARTIES AND MOVIE NIGHTS, UNITED WAY PROVIDED A GRANT TO SUPPORT READING RECREATION'S MOVIE NIGHTS AT 11TH & PIKE PARK THROUGHOUT THE SUMMER OF 2023. MEMBERS OF THE ECE CONTINUED ENGAGEMENT

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

EFFORTS WITH FAMILIES AT THESE EVENTS. THE TEAM IS ALSO WORKING WITH THE NORTHEAST BRANCH OF THE READING PUBLIC LIBRARY TO SERVE AS HUB OF ACTIVITIES FOR FAMILIES WITH YOUNG CHILDREN. A SOCIAL MEDIA CAMPAIGN (IN ENGLISH AND SPANISH) PROVIDING STATS ABOUT THE IMPORTANCE OF EARLY CHILDHOOD EDUCATION, AS WELL AS A VIDEO SERIES "MAKE LEARNING FUN!" RECEIVED MUCH ATTENTION.

FINANCIAL STABILITY

UNITED WAY OF BERKS COUNTY IS COMMITTED TO EFFORTS THAT HELP INDIVIDUALS AND FAMILIES ACCESS STABLE HOUSING, GAIN JOB SKILLS AND BUILD FINANCIAL LITERACY SO THEY HAVE INCREASED OPPORTUNITIES TO ACHIEVE LONG-TERM FINANCIAL STABILITY, BENEFITTING 2,800+ BERKS RESIDENTS IN 2023. THIS IS ACCOMPLISHED THROUGH FUNDING PROGRAMS WITH OUR AGENCY PARTNERS, IN ADDITION TO PROVIDING SPECIAL GRANTS FOR OTHER ORGANIZATIONS HELPING PEOPLE TO ATTAIN FINANCIAL INDEPENDENCE IN DIFFERENT WAYS.

AFFORDABLE HOUSING

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS HAVE ACCESS TO SAFE AND AFFORDABLE HOUSING.

-- HABITAT FOR HUMANITY OF BERKS COUNTY, INC., HOME CONSTRUCTION/RENOVATION FOR LOW INCOME FAMILIES: HABITAT FOR HUMANITY BUILDS, RENOVATES, AND REPAIRS HOMES USING VOLUNTEER LABOR AND DONATIONS TO PROVIDE SAFE, AFFORDABLE HOUSING FOR LOW-INCOME FAMILIES. RECIPIENTS OF HOMES INVEST THEIR OWN LABOR, CALLED "SWEAT EQUITY", INTO THE BUILDING/RENOVATION, AND PURCHASE THE HOME THROUGH AN AFFORDABLE FINANCING PROGRAM.

-- MIDPENN LEGAL SERVICES HANDLES LANDLORD/TENANT ISSUES, MORTGAGE

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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FORECLOSURE, PUBLIC HOUSING AND OTHER ISSUES AFFECTING LOW-INCOME RESIDENTS RENTERS AND HOMEOWNERS. THEY REPRESENTED CLIENTS TO RESOLVE THEIR HOUSING ISSUE WITH A POSITIVE RESULT OF PRESERVING THEIR HOUSING.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS HAVE ACCESS TO TRANSITIONAL OR PERMANENT SUPPORTIVE HOUSING.

-- THE SALVATION ARMY READING CORPS, PERMANENT SUPPORTIVE HOUSING: SUPPORTIVE HOUSING PROGRAM OFFERS PERMANENT HOUSING TO CHRONICALLY HOMELESS AND DISABLED ADULTS AND FAMILIES. THE PROGRAM INCLUDES RENTAL ASSISTANCE, LANDLORD RELATIONS, LIFE SKILLS TRAINING, MONITORING OF BOTH FISCAL (BUDGET) AND PHYSICAL/MENTAL HEALTH ISSUES, CONNECTION WITH THE SALVATION ARMY'S FAMILY SERVICES PROGRAM, AND OTHER COMMUNITY PROGRAMS. SKILLED CASEWORKERS DEVELOP AND MONITOR A 12-POINT ENCOURAGEMENT PLAN FOR EACH INDIVIDUAL AND FAMILY.

-- YMCA OF READING & BERKS COUNTY, TRANSITIONAL HOUSING: INDIVIDUALS WHO ARE EXPERIENCING HOMELESSNESS, CHEMICAL DEPENDENCY, MENTAL HEALTH ISSUES, AND SOCIAL SERVICE NEEDS IN BERKS COUNTY HAVE A SAFE AND SECURE PLACE TO STAY. THE TRANSITIONAL LIVING PROGRAMS PROVIDE INTENSIVE CASE MANAGEMENT SERVICES AND SUPPORTIVE RESOURCE CONNECTIONS IN AN EFFORT TO ADDRESS AND RESOLVE THE ROOT CAUSES OF HOMELESSNESS, CHEMICAL DEPENDENCY, MENTAL HEALTH, AND OTHER SOCIAL SERVICE NEEDS.

EMPLOYMENT/JOB SKILLS

- COMMUNITY-LEVEL OUTCOME: UNEMPLOYED AND UNDEREMPLOYED INDIVIDUALS PARTICIPATE IN JOB PREPAREDNESS AND SOFT SKILLS TRAINING, AND RECEIVE SUPPORT TO BETTER CONNECT THEM WITH, AND HELP MAINTAIN, EMPLOYMENT.

-- THRESHOLD REHABILITATION SERVICES, INC., BERKS PERSONNEL NETWORK: PROVIDES COMPREHENSIVE EMPLOYMENT SERVICES DESIGNED TO SUPPORT AND

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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EMPOWER PEOPLE WITH DISABILITIES TO OBTAIN AND MAINTAIN COMPETITIVE EMPLOYMENT IN THE COMMUNITY. THE SERVICES ARE INDIVIDUALLY TAILORED TO MEET EACH PERSON'S AREAS OF NEED. ACTIVITIES MAY INCLUDE CAREER EXPLORATION, RESUME AND EMPLOYMENT APPLICATION SUPPORT, JOB INTERVIEW SUPPORT, ADVOCACY, TRANSPORTATION TRAINING, JOB DEVELOPMENT AND PLACEMENT, ON-THE-JOB TRAINING, SERVICE COORDINATION, AND FOLLOW-UP SUPPORT.

-- CONNECTIONS WORKS (FORMERLY KNOWN AS BERKS CONNECTIONS PRETRIAL SERVICES), PRISONER REENTRY SERVICES: INMATES AT THE BERKS COUNTY JAIL ARE ASSESSED UTILIZING A NATIONALLY-VALIDATED RISK-NEEDS TOOL AND SCREENED FOR POST-RELEASE NEEDS. INMATES WHO QUALIFY ARE TRANSFERRED TO THE BERKS COUNTY COMMUNITY REENTRY CENTER (CRC). ALL RESIDENTS ARE ASSIGNED A CASE MANAGER AND RECEIVE AN INDIVIDUALIZED TRANSITION PLAN. SECURING STABLE, SUSTAINABLE EMPLOYMENT IS A GOAL THAT CONNECTIONS WORK SPENDS THE MOST TIME WORKING ON WITH CLIENTS' POST-RELEASE. REENTRANTS REVIEW LESSONS LEARNED FROM EMPLOYMENT GROUPS AT THE CRC AND ARE PROVIDED WITH ONGOING COACHING AND SUPPORT TO AID IN OBTAINING AND MAINTAINING EMPLOYMENT. CLIENTS RECEIVE DIRECT ASSISTANCE THROUGH JOB LEADS, INTERVIEWING SKILLS PRACTICE, RESUME UPDATES AND SUPPORT UTILIZING THE COMPUTER BASED LEARNING CENTER (CBLC) FOR COMPLETING APPLICATIONS, AND CHECKING EMAIL FOR CORRESPONDENCE FROM POTENTIAL EMPLOYERS.

-- FAMILY PROMISE OF BERKS COUNTY, INC. U-TURN PROGRAM SERVES UNACCOMPANIED, HOMELESS, AND AT-RISK YOUTH. FAMILY PROMISE WORKS WITH PROGRAM PARTICIPANTS WHO ARE ACTIVELY SEEKING EMPLOYMENT TO ASSIST WITH EMPLOYMENT SEARCHES AND INTERVIEW PREPARATION.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS IMPROVE LITERACY AND ENGLISH LANGUAGE SKILLS.

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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-- LITERACY COUNCIL OF READING-BERKS, LITERACY TRAINING AND ESL: ONE-ON-ONE TUTORING MATCHES ADULTS WITH A TRAINED VOLUNTEER TUTOR TO WORK ON THE BASIC SKILLS NEEDED TO GET OR RETAIN A JOB OR ENTER POST-SECONDARY EDUCATION. ESL CLASSES AND ENGLISH-LANGUAGE CIVICS CLASS ARE CONDUCTED WEEKLY, RANGING FROM THE BEGINNING LEVEL TO HIGH ADVANCED LEVEL. CLASSES HELP ADULTS LEARN TO SPEAK, READ AND WRITE ENGLISH AND PREPARE THEM FOR SUCCESSFUL CAREERS. THEY ALSO OFFER CITIZENSHIP PREPARATION CLASSES, A WORKFORCE DEVELOPMENT PROGRAM, HIGH SCHOOL EQUIVALENCY CERTIFICATION CLASSES, AND MORE.

-- LITERACY COUNCIL OF READING-BERKS, ENGLISH FORWARD: INCREASES ACCESS TO ESL CLASSES IN BERKS COUNTY AND IMPROVES THE QUALITY OF ESL INSTRUCTION IN ADULT CLASSROOMS THROUGH INSTRUCTOR TRAINING AND SUPPORT, CLASSROOM RESOURCE DEVELOPMENT, AND TECHNICAL ASSISTANCE. ONCE INSTRUCTORS COMPLETE THE 11-HOUR INSTRUCTOR TRAINING, THEY CAN BEGIN THEIR OWN ESL PROGRAMS. THE COUNCIL PROVIDES CONTINUED LEARNING OPPORTUNITIES FOR INSTRUCTORS TO ENSURE THE QUALITY OF ADULT INSTRUCTION ACROSS ALL ESL PROGRAMS.

-- READING AREA COMMUNITY COLLEGE, BILINGUAL ESL PROGRAM : SINCE 2008, UNITED WAY HAS PROVIDED A YEARLY GRANT TO READING AREA COMMUNITY COLLEGE TO OFFER ENGLISH AS A SECOND LANGUAGE (ESL) CLASSES FOR PEOPLE WITH THE MOST BASIC ENGLISH LANGUAGE SKILLS, OR NONE AT ALL, AND PROVIDE THEM WITH A MORE FLEXIBLE AND CUSTOMIZED LEARNING ENVIRONMENT. IN 2023, 136 PEOPLE WERE ABLE TO COMPLETE THE PROGRAM.

PERSONAL FINANCIAL MANAGEMENT

- INDIVIDUALS DEVELOP BASIC FINANCIAL MANAGEMENT SKILLS

-- FAMILY PROMISE OF BERKS COUNTY, INC.

-- FRIEND, INC. COMMUNITY SERVICES, COMMUNITY RESOURCE CONNECTIONS

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-165375
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-- HABITAT FOR HUMANITY OF BERKS COUNTY, HOMER OWNERSHIP OPPORTUNITIES FOR MODERATE INCOME FAMILIES

-- THE SALVATION ARMY READING CORPS, PERMANENT SUPPORTIVE HOUSING

FINANCIAL STABILITY CASE MANAGEMENT

- INDIVIDUALS RECEIVE CASE MANAGEMENT TO IMPROVE THEIR LIVES.

-- CASA OF BERKS COUNTY

-- CENTRO HISPANO DANIEL TORRES

-- CONNECTIONS WORK

-- JEWISH FAMILY SERVICE

-- THE SALVATION ARMY - READING CORPS

-- UNITED COMMUNITY SERVICES FOR WORKING FAMILIES (UCS)

-- YMCA OF READING & BERKS COUNTY

HEALTH FOCUS AREA

HEALTH IMPACTS EVERY ASPECT OF A PERSON'S LIFE. GOOD HEALTH ALLOWS CHILDREN TO LEARN BETTER AND ADULTS TO LIVE MORE PRODUCTIVE, FULLER LIVES. THROUGH FUNDING PROGRAMS WITH OUR AGENCY PARTNERS AND OUR INVOLVEMENT IN VARIOUS COMMUNITY COLLABORATIONS, UWBC IS CREATING OPPORTUNITIES FOR PEOPLE TO ACHIEVE THEIR OPTIMAL HEALTH AND INDEPENDENCE. PROGRAMS UNITED WAY SUPPORTS ADDRESS BOTH THE PREVENTIVE ASPECT OF PHYSICAL AND MENTAL HEALTH ISSUES, WHILE ALSO ADDRESSING INTERVENTIONAL NEEDS AND IMPACTED 41,200 BERKS RESIDENTS IN 2023.

MENTAL HEALTH

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS EXPERIENCING BEHAVIORAL HEALTH PROBLEMS RECEIVE SERVICES THAT IMPROVE THEIR ABILITY TO FUNCTION.

-- FAMILY GUIDANCE CENTER, COUNSELING: ASSISTS PERSONS IN IMPROVING

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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THEIR QUALITY OF LIFE BY PROVIDING AFFORDABLE, ACCESSIBLE, QUALITY COUNSELING SERVICES. THEY UTILIZE QUALIFIED, CREDENTIALLED, COMPETENT STAFF TRAINED IN EVIDENCE-BASED PRACTICE APPROACHES.

-- GREATER READING MENTAL HEALTH ALLIANCE, ADVOCACY AND SUPPORT GROUPS: ASSIST INDIVIDUALS, INCLUDING CHILDREN AND THEIR FAMILIES, AS WELL AS ADULTS, WITH MENTAL ILLNESS TO DEVELOP STRATEGIES AND ADVOCATE FOR THEMSELVES IN ORDER TO RECEIVE THE SERVICES THEY NEED.

HEALTH AND WELLNESS

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS DEVELOP AND PRACTICE ACTIVE LIFESTYLES.

-- EASTERSEALS EASTERN PENNSYLVANIA, THERAPEUTIC RECREATION: SEVERAL THERAPEUTIC PROGRAMS ARE OFFERED THROUGHOUT THE YEAR THAT PROVIDE SOCIAL, FITNESS, COMMUNITY, LIFE SKILLS, AND OUTDOOR RECREATIONAL OPPORTUNITIES. PROGRAMS ARE OFFERED FRIDAY EVENINGS, SATURDAYS, AND ALL WEEK LONG DURING THE SUMMER MONTHS. IN ADDITION, THERE ARE A NUMBER OF EVENTS THROUGHOUT THE YEAR IN COMMUNITY-BASED SETTINGS.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS HAVE ACCESS TO HIGH-QUALITY, PATIENT-CENTERED HEALTH CARE.

-- TOWER HEALTH AT HOME, SKILLED NURSING AND RELATED SERVICES: PATIENTS ARE REFERRED TO THIS PROGRAM BECAUSE THEY HAVE A MEDICAL CONDITION THAT MAY BE TREATED EFFECTIVELY IN THEIR HOME, RATHER THAN A HOSPITAL OR NURSING HOME SETTING. AS MEDICAL TECHNOLOGY HAS IMPROVED, MANY TREATMENTS AND RECOVERY SURGICAL PROCEDURES NOW TAKE PLACE IN THE HOME RATHER THAN IN HOSPITALS, NURSING HOMES, OR REHABILITATION FACILITIES. NURSES ESTABLISH A PLAN OF CARE THAT INCLUDES A VISIT-FREQUENCY PLAN AND OUTLINES THE TYPES OF CARE NEEDED.

-- TOWER HEALTH STREET MEDICINE: HOMELESS PEOPLE ARE FREQUENT

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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EMERGENCY ROOM VISITORS AND DO NOT HAVE ACCESS TO CONSISTENT HEALTHCARE. ON AVERAGE, HOMELESS INDIVIDUALS VISIT THE ER FIVE TIMES PER YEAR. STREET MEDICINE PATIENTS RECEIVE VERY SIMILAR CARE TO THOSE VISITING A PRIMARY CARE PHYSICIAN. PATIENTS ARE REGISTERED, TRIAGED AND THEN SEEN BY A PHYSICIAN OR APP. THE GOAL IS TO REPLICATE WHAT YOU MIGHT FIND IN A BRICK-AND-MORTAR PRIMARY CARE PRACTICE. VERY FREQUENTLY DURING A VISIT, PHYSICIANS CAN PROVIDE IMMEDIATE TREATMENT. THE TEAM PROVIDES AN IN-PERSON CLINIC 1/WEEK AT VARIOUS COMMUNITY LOCATIONS. ADDITIONALLY, A TELEMEDICINE KIOSK LOCATED AT HOPE RESCUE OPERATES FOR 12-15 HOURS/WEEK.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS HAVE ACCESS TO HEALTHY FOODS TO IMPROVE THEIR HEALTH.

-- BERKS ENCORE, MEALS ON WHEELS: HOME-BOUND, ISOLATED SENIORS AGED 60+ AND HOME-BOUND DISABLED ADULTS UNDER THE AGE OF 60 RECEIVE A HOT, HOME-DELIVERED MEAL, FIVE DAYS A WEEK. THIS HOME DELIVERED MEAL SERVICE ENABLES THE HOME-BOUND SENIOR TO LIVE INDEPENDENTLY AS LONG AS POSSIBLE AND RELIEVES THE ISOLATION AND LONELINESS THEY EXPERIENCE.

-- BOYERTOWN AREA MULTI-SERVICE, INC., SUPPORTIVE SERVICES PROGRAM PROVIDES CASE MANAGEMENT SERVICES AND MEETS THE NEEDS OF INDIVIDUALS AND FAMILIES FACING VARIOUS ISSUES INCLUDING FOOD INSECURITY. THE ORGANIZATION PROVIDES A FOOD PANTRY, WHICH THE NEED FOR THIS SERVICE CONTINUES TO GROW, AS WELL AS PREPARES AND ORGANIZES THE DELIVERY OF THE MEALS ON WHEELS PROGRAM.

-- HELPING HARVETS, ACCESS TO FOOD: THE WEEKENDER PROGRAM
- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS RECEIVE ADVOCACY AND PREVENTATIVE AND MANAGED CARE FOR CHRONIC DISEASES AND HEALTH CONDITIONS.

-- FAMILY PROMISE OF BERKS COUNTY, INC.

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-165375
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- GREATER READING MENTAL HEALTH ALLIANCE, ADVOCACY AND SUPPORT GROUPS
- EASTERSEALS OF EASTERN PENNSYLVANIA
- READING HOSPITAL TOWER HEALTH, STREET MEDICINE
- TOWER HEALTH AT HOME, SKILLED NURSING AND RELATED SERVICES

SELF-SUFFICIENCY AND INDEPENDENT LIVING

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS RECEIVE EARLY ASSESSMENT AND INTERVENTION SERVICES.

- BERKS ENCORE, MEALS ON WHEELS
- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS MAINTAIN INDEPENDENT LIVING IN THEIR RESIDENCE.

-- EASTERSEALS EASTERN PENNSYLVANIA, OUTPATIENT THERAPY: AT THEIR CENTER IN READING, EASTERSEALS OFFERS PHYSICAL, OCCUPATIONAL AND SPEECH THERAPIES TO HELP CHILDREN OF ALL AGES DEVELOP NEW SKILLS AND IMPROVE THEIR OVERALL LEVEL OF FUNCTIONING.

-- EASTERSEALS EASTERN PENNSYLVANIA, PEDIATRIC CLINICS: SPECIALTY MEDICAL CLINICS BRING THE SERVICES OF TOP-QUALITY MEDICAL AND SURGICAL SPECIALISTS TO BERKS COUNTY TO WORK WITH CHILDREN WITH COMPLEX MEDICAL NEEDS. EASTERSEALS PROVIDE SPECIALTY PEDIATRIC NEUROLOGY, ORTHOPEDIC, ORTHOTIC, AND FEEDING CLINICS ALL UNDER ONE ROOF. CLINIC SERVICES ARE OFFERED AT NO CHARGE TO THE FAMILIES.

- TOWER HEALTH AT HOME, SKILLED NURSING AND RELATED SERVICES

HEALTH CASE MANAGEMENT

- INDIVIDUALS RECEIVE CASE MANAGEMENT TO IMPROVE THEIR LIVES.

- AMERICAN CANCER SOCIETY
- BOYERTOWN AREA MULTI-SERVICES
- CENTRO HISPANO DANIEL TORRES

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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-- CO-COUNTY WELLNESS SERVICES, BERKS TEENS

-- EASTERSEALS EASTERN PENNSYLVANIA

-- READING HOSPITAL TOWER HEALTH STREET MEDICINE

COMMUNITY COLLABORATIONS:

BERKS COMMUNITY HEALTH CENTER: TO ASSIST IN MAKING HEALTH CARE EASIER TO OBTAIN FOR BERKS COUNTY RESIDENTS WHO ARE UNINSURED OR UNDERINSURED, UNITED WAY PARTNERED WITH LOCAL HOSPITALS AND OTHER ORGANIZATIONS TO ESTABLISH THE BERKS COMMUNITY HEALTH CENTER (BCHC), WHICH OPERATES OUR COMMUNITY'S TWO FEDERALLY QUALIFIED HEALTH CENTERS AND PROVIDES QUALITY, PRIMARY HEALTH CARE FOR ADULTS AND CHILDREN, REGARDLESS OF ABILITY TO PAY. UNITED WAY'S ROLE IN THIS EFFORT INCLUDES PROVIDING STAFF TO SERVE ON THE ADVISORY COUNCIL TO THE BOARD, BUILDING RELATIONSHIPS WITH OTHER COMMUNITY ORGANIZATIONS TO IDENTIFY POTENTIAL CLIENTS, AND ASSISTING WITH MARKETING AND AWARENESS FOR THE CENTER. UWBC INVESTED \$25,000 IN PENN STATE HEALTH ST. JOSEPH FOR VEGGIE RX PROGRAM: WITH MORE FAST FOOD AND CORNER STORES THAN GROCERY OR MARKET OPTIONS, THE CITY OF READING IS CONSIDERED A "FOOD DESERT." IN A 2014 READING FOOD NEEDS ASSESSMENT, RESPONDENTS LISTED AFFORDABILITY AND ACCESSIBILITY AS BARRIERS AND 62 PERCENT CONSUMED VEGETABLES AND FRUIT LESS THAN FOUR TIMES A WEEK. RESULTS FROM TWO RECENT COMMUNITY HEALTH NEEDS ASSESSMENTS FOR BERKS COUNTY PRIORITIZE OBESITY AND CHRONIC ILLNESS AS AREAS OF GREATEST NEED. OVER 20 PERCENT OF ADULTS SUFFER FROM DIABETES, NEARLY 40 PERCENT HAVE HIGH BLOOD PRESSURE, AND 35 PERCENT ARE CONSIDERED OBESE.

([HTTP://WWW.THEFUTUREOFHEALTHCARE.ORG/ASSETS/COMMUNITY-HEALTH-NEEDS-ASSESSMENT.PDF](http://www.thefutureofhealthcare.org/assets/community-health-needs-assessment.pdf)).

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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IN RESPONSE TO THESE COMMUNITY NEEDS, PENN STATE HEALTH ST. JOSEPH IMPLEMENTED A PREVENTATIVE HEALTHCARE PROGRAM IN WHICH PHYSICIANS AT THEIR DOWNTOWN READING CAMPUS PRESCRIBE VOUCHERS FOR DISCOUNTED FRUITS AND VEGETABLES TO PATIENTS AT-RISK FOR, OR CURRENTLY FACING, FOOD INSECURITY AND/OR DIET-RELATED CHRONIC ILLNESSES. THROUGH PARTNERSHIPS WITHIN THE LOCAL COMMUNITY AND ADAPTING THE NATIONALLY USED, EVIDENCE-BASED VEGGIE RX MODEL, PATIENTS REDEEM VOUCHERS AT PARTICIPATING FARMER'S MARKETS, GROCERY STORES, AND BODEGAS. AUGMENTED WITH COOKING DEMONSTRATIONS AND NUTRITION EDUCATION, THIS PROGRAM IS CLOSELY MONITORED TO TRACK KEY PATIENT HEALTH INDICATORS, WHICH EVALUATE PROGRESS AND OVERALL PROGRAM EFFECTIVENESS.

UNITED WAY'S ONGOING SUPPORT ASSISTED WITH PROGRAM EXPANSION FROM THE VEGGIE RX PILOT PROGRAM INTO ITS NEXT FORMAL PHASE, VEGGIE RX 2.0, AND SUSTAIN PSHSJ'S HEALTHY FOOD ACCESS PROGRAMMING FOR FOOD INSECURE AND AT-RISK PATIENTS. IN 2023, THEY WERE ABLE TO EXPAND THE PROGRAM TO A BROADER PATIENT POPULATION, INCREASING THE NUMBER OF PATIENTS ENROLLED TO A TOTAL OF 154, AND FAMILY MEMBERS WERE POSITIVELY IMPACTED. THE VEGGIE RX ADDRESSES HIGH LEVELS OF TYPE 2 DIABETES AND OBESITY IN OUR COMMUNITY, SPECIFICALLY WITHIN PSHSJ PATIENT POPULATION AT THE HOSPITAL'S DOWNTOWN CAMPUS. MOST VEGGIE RX PATIENTS ARE CONSIDERED LOW-INCOME (MEASURED BY FOOD INSECURITY QUESTIONS), AND THIS PROGRAM EXPANDS THEIR PURCHASING POWER FOR NUTRITIOUS FRUITS AND VEGETABLES, FOOD WHICH OTHERWISE OFTEN GETS PASSED ON FOR CHEAPER, NUTRITIONALLY DEPLETED ALTERNATIVES. VEGGIE RX VOUCHERS ARE PAIRED WITH NUTRITION EDUCATION, WHICH EMPOWERS PATIENTS TO LEARN WAYS OF MAKING HEALTHIER CHOICES WHILE HAVING THE DIGNITY OF PURCHASING THEIR OWN FOOD.

SINGLECARE DISCOUNT PRESCRIPTION DRUG PROGRAM

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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UNITED WAY OF BERKS COUNTY HAS JOINED WITH 1,000 UNITED WAYS ACROSS THE NATION IN LOWERING THE COSTS OF PRESCRIPTION MEDICATION THROUGH ADMINISTERING SINGLECARE (FORMERLY FAMILYWIZE) PROGRAM. THE SINGLECARE DISCOUNT PRESCRIPTION CARD IS AVAILABLE FREE-OF-CHARGE TO ANYONE WHO NEEDS ASSISTANCE IN PAYING FOR PRESCRIPTIONS NOT COVERED BY AN INSURANCE PLAN. IN 2023, INDIVIDUALS WERE ASSISTED WITH A PRESCRIPTION DISCOUNT UTILIZING SINGLECARE, REPRESENTING \$209,356 IN SAVINGS FOR PEOPLE ACROSS THE COUNTY.

SAFETY-NET SERVICES

PART OF UNITED WAY'S MISSION IS TO ENSURE THAT THE BASIC NECESSITIES OF LIFE ARE AVAILABLE FOR THOSE IN NEED. UNITED WAY'S PARTNERSHIPS AND FUNDED PROGRAMS PROVIDE A CRUCIAL SAFETY NET FOR VULNERABLE POPULATIONS TO QUICKLY ACCESS HELP AND RECEIVE THE NECESSARY SUPPORT TO HELP THEM HAVE A BETTER QUALITY OF LIFE, BOTH NOW AND IN THE FUTURE. MANY OF OUR FUNDED PROGRAMS ARE ALSO TAKING AN ADDED APPROACH TO PROVIDING EMERGENCY SERVICES THAT SIMPLY TAKE CARE OF THE CRISIS AT HAND FOR THEIR CLIENTS; PROGRAMS ARE NOW STARTING TO HELP ADDRESS THE ROOT CAUSES OF WHY A CLIENT NEEDS SAFETY NET SERVICES, TO HOPEFULLY AVOID THE CLIENT REQUIRING THESE TYPES OF SERVICES IN THE FUTURE. THE FOLLOWING PROGRAMS SUPPORTED OVER 154,300 RESIDENTS IN BERKS COUNTY IN 2023.

BASIC NEEDS

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS IN CRISIS HAVE THEIR BASIC NEEDS MET.

-- AMERICAN RED CROSS TRI-COUNTY CHAPTER, DISASTER SERVICES: DISASTER CYCLE SERVICES PROVIDES IMMEDIATE EMERGENCY ASSISTANCE TO THE RESIDENTS

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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OF BERKS COUNTY WHO HAVE BEEN AFFECTED BY NATURAL OR MAN-MADE DISASTERS. TRAINED RED CROSS VOLUNTEERS AND STAFF RESPOND TO DISASTER SITUATIONS AND PROVIDE FOR THE IMMEDIATE EMERGENCY NEEDS OF SHELTER, FOOD, AND CLOTHING. ADDITIONAL ASSISTANCE IN OBTAINING LOST MEDICATIONS AND EYEGLASSES IS ALSO PROVIDED. RED CROSS STAFF CONTINUES TO WORK LONGER TERM WITH CLIENTS THAT NEED HELP WITH RENT OR BEDDING OR REFERRALS FOR HOUSEHOLD FURNISHINGS. IN LARGER DISASTER SITUATIONS, THE RED CROSS IS RESPONSIBLE FOR MASS CARE SHELTERING AND FEEDING OF DISPLACED RESIDENTS. THE RED CROSS ALSO PROVIDES MASS CARE FEEDINGS FOR EMERGENCY RESPONSE PERSONNEL ON THE SCENE OF A DISASTER. STAFF AND VOLUNTEERS ARE TRAINED IN RED CROSS DISASTER SERVICES.

-- BERKS COALITION TO END HOMELESSNESS (BCEH), HOMELESS PREVENTION: IN BERKS COUNTY, THERE ARE TWO PRIMARY HOMELESS SHELTERS, OF WHICH ONLY ONE ACCOMMODATES FEMALES AND FAMILIES. THE HOTEL PROGRAM, PARTIALLY FUNDED BY UNITED WAY, PROVIDES A SECURE HAVEN FOR FAMILIES DURING CODE BLUE MONTHS. BCEH COLLABORATED WITH THE INN AT READING AS PART OF ITS PARTNERSHIP INITIATIVES. DURING THE 2023 WINTER, UWBC'S INVESTMENT PREVENTED 177 INDIVIDUALS FROM BEING HOMELESS.

-- FAMILY PROMISE OF BERKS COUNTY, INC., U-TURN PROGRAM: SERVES UNACCOMPANIED, HOMELESS AND AT-RISK YOUTH AND PROVIDES ADVOCACY, CASE MANAGEMENT, SHELTER, AND PERMANENT HOUSING. THE DROP-IN CENTER OFFERS YOUTH A SAFE, HOME-LIKE PLACE TO SHOWER, COOK, DO LAUNDRY, ACCESS TO DEDICATED STAFF, COMPUTERS, PEER CONNECTIONS, RECEIVE NUTRITIOUS SNACKS, MEALS, TOILETRIES AND MORE. IN 2023, 40 YOUTHS WERE PROVIDED SHELTER OR PREVENTED FROM EXPERIENCING AN EPISODE OF HOMELESSNESS.

-- HELPING HARVEST, ACCESS TO FOOD: THE WEEKENDER PROGRAM WAS ESTABLISHED TO HELP NOURISH LOW-INCOME, AT-RISK, ELEMENTARY SCHOOL STUDENTS OVER THE WEEKEND - A TIME WHEN THEY MAY OTHERWISE GO WITHOUT

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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PROPER NOURISHMENT. CHILDHOOD POVERTY, AND AS A RESULT HUNGER, ARE UNFORTUNATELY GROWING PROBLEMS IN BERKS COUNTY. ACCORDING TO THE PENNSYLVANIA DEPARTMENT OF EDUCATION, FOOD AND NUTRITION DIVISION, APPROXIMATELY 50% OF BERKS COUNTY ELEMENTARY SCHOOL STUDENTS QUALIFY FOR FREE OR REDUCED LUNCHES; MEANING, THEIR FAMILY IS LIVING IN, OR CLOSE TO, POVERTY.

-- JEWISH FAMILY SERVICE, SUPPORTIVE SERVICES: SUPPORTIVE SERVICES PROGRAM HELPS CLIENTS AND THEIR FAMILIES FACE VARIOUS CHALLENGES INCLUDING HEALTH, AGING, INTERPERSONAL RELATIONSHIPS, TRANSPORTATION, AND FINANCIAL DIFFICULTIES. CLIENTS ARE EITHER SELF-REFERRED OR REFERRED TO BY NEIGHBORS, FAMILY MEMBERS, CLERGY, PROFESSIONALS IN THE COMMUNITY, AND THROUGH HOSPITAL OUTREACH VISITS. EACH CLIENT IS EVALUATED TO DETERMINE THE APPROPRIATE LEVEL OF SERVICE.

-- JEWISH FAMILY SERVICE, FOOD PANTRY: TWO FOOD PANTRIES ARE OFFERED EACH MONTH. ONE IS HELD AT ANOTHER UWBC PARTNER, OLIVET'S PENDORA PARK LOCATION. THE SECOND IS HELD AT THE SEVENTH DAY ADVENTIST CHURCH IN HAMPDEN HEIGHTS.

-- MIDPENN LEGAL SERVICES, LEGAL REPRESENTATION TO SECURE BASIC NEEDS: LOW-INCOME CLIENTS RECEIVE LEGAL COUNSEL AND ADVICE REGARDING THEIR PARTICULAR LEGAL SITUATION THROUGH MIDPENN'S READING OFFICE. MIDPENN WORKS WITH SAFEBERKS TO ENSURE THAT ALL DOMESTIC VIOLENCE SURVIVORS HAVE ACCESS TO THE JUSTICE SYSTEM. THEY ARE A MEMBER OF BERKS COALITION TO END HOMELESSNESS (BCEH), AND THROUGH THIS PARTNERSHIP, MIDPENN MAKES AND ACCEPTS REFERRALS ON BEHALF OF INDIVIDUALS WHO REQUIRE THEIR LEGAL SERVICES.

-- NEW JOURNEY COMMUNITY OUTREACH (NJCO) FOOD ACCESS PROGRAMS INCLUDE SOUP KITCHEN AND FOOD PANTRY SERVICES THAT FOCUS ON THE IMMEDIATE AND LONG-TERM HEALTH IMPLICATIONS OF RECEIVING A NUTRITIOUS DAILY MEAL AND

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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SUPPLEMENTAL GROCERIES. NJCO IS THE LARGEST SOUP KITCHEN IN DOWNTOWN READING. IN 2023, THE DEMAND FOR SERVICES INCREASED DRAMATICALLY WITH AN AVERAGE OF 300 MEALS BEING SERVED DAILY, MONDAY-FRIDAY. THE WEEKLY FOOD PANTRY DISTRIBUTIONS REACHED, ON AVERAGE, 300 FAMILIES WEEKLY. NJCO ALSO SAW EMERGENCY FOOD REFERRALS INCREASE TO AN AVERAGE OF 55 PER WEEK.

-- OPPORTUNITY HOUSE, EMERGENCY SHELTER: PROVIDES EMERGENCY SHELTER HOUSING TO HOMELESS CHILDREN, WOMEN AND MEN, AS WELL AS, ON-SITE CASE MANAGEMENT SERVICES, AND CHILDCARE. BERKS COUNSELING SERVICES PROVIDES ON-SITE BEHAVIORAL HEALTH COUNSELING AND MEDICAL CARE IS PROVIDED THROUGH THE BERKS COMMUNITY HEALTH CENTER AT 2ND STREET.

-- SALVATION ARMY READING CORPS, FAMILY SERVICES PROGRAM: ASSIST CLIENTS TO RECEIVE EMERGENCY BASIC NEEDS, INCLUDING MONTHLY FOOD DISTRIBUTIONS, CLOTHING DISTRIBUTIONS, AND THROUGH CASE MANAGEMENT PROVIDED UTILITY ASSISTANCE, PRESCRIPTION DRUG ASSISTANCE, RENTAL ASSISTANCE, EDUCATION ABOUT COMMUNITY RESOURCES AND APPROPRIATE REFERRALS. THEY ALSO OFFER A YEAR-ROUND FURNITURE BANK.

-- SALVATION ARMY: SERVICE EXTENSION UNITS, COMMUNITY WELFARE: COVERING THE HAMBURG AREA, THEY PROVIDE IMMEDIATE EMERGENCY ASSISTANCE TO MEET A SHORT-TERM NEED. AS A SERVICE UNIT, THEY ARE A VOLUNTEER COMMITTEE IN A REGION WHERE THERE ARE NO PROFESSIONAL SALVATION ARMY PERSONNEL. EXAMPLES OF SERVICE UNIT EMERGENCY ASSISTANCE PROVIDED INCLUDED GROCERIES, RENTAL ASSISTANCE, FUEL/UTILITIES, MEDICAL/DENTAL/EYE CARE, CLOTHING, SCHOOL SUPPLIES FOR SCHOOL AGED CHILDREN, TEMPORARY SHELTER, AND SEASONAL ASSISTANCE.

- COMMUNITY-LEVEL OUTCOME: VICTIMS OF DOMESTIC VIOLENCE AND/OR SECUAL ASSAULT ARE ENSURED SAFETY AND SUPPORTIVE SERVICES.

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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-- SAFEBERKS, CRISIS SERVICES: SUPPORTS THE SAFE HOUSE PROGRAM, AN EMERGENCY SHELTER TO INDIVIDUALS AND FAMILIES IMPACTED BY DOMESTIC VIOLENCE AND SEXUAL ASSAULT FOR UP TO 60 DAYS. ALL DAILY NECESSITIES OF FOOD, CLOTHING, HYGIENE PRODUCTS, IN ADDITION TO SAFETY PLANNING, CASE MANAGEMENT AND CONNECTION TO COMMUNITY RESOURCES, DOMESTIC VIOLENCE AND SEXUAL ASSAULT COUNSELING, CHILDREN'S PROGRAMMING, INCLUDING A READY TO READ PROGRAM, NUTRITION PROGRAMS, RECREATIONAL SUPPORTS ARE PROVIDED. CRISIS SERVICES INCLUDE THE EMERGENCY HOTLINE, WITH TEXTING NOW AVAILABLE 24/7/365 IN ENGLISH AND SPANISH. THE RAPID RESPONSE PROGRAM PROVIDES SUPPORT TO VICTIMS SEEKING EMERGENCY PROTECTION OR WHO ARE ACCESSING EMERGENCY MEDICAL SERVICES, BASIC CARE, OR RAPE EXAMS AT AREA EMERGENCY ROOMS AND CLINICS.

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS HAVE ACCESS TO TRANSPORTATION.

-- AMERICAN CANCER SOCIETY

-- AMERICAN RED CROSS: BERKS COUNTY CHAPTER, VETERANS TRANSPORTATION: VETERANS RECEIVE SAFE AND RELIABLE TRANSPORTATION TO AND FROM THE LEBANON VA MEDICAL CENTER TO REACH NECESSARY MEDICAL APPOINTMENTS.

-- EASTERSEALS EASTERN PENNSYLVANIA, PEDIATRIC CLINICS

SAFETY NET CASE MANAGEMENT

- COMMUNITY-LEVEL OUTCOME: INDIVIDUALS RECEIVE CASE MANAGEMENT TO IMPROVE THEIR LIVES.

-- CASA OF BERKS COUNTY (COURT APPOINTED SPECIAL ADVOCATE PROGRAM): CASA IS A NATIONAL PROGRAM THAT RECRUITS AND TRAINS VOLUNTEERS TO SERVE AS ADVOCATES FOR CHILDREN WHO HAVE BEEN PLACED IN THE FOSTER CARE SYSTEM. THERE ARE ON AVERAGE 600 CHILDREN IN THE FOSTER CARE SYSTEM/RESIDENTIAL TREATMENT FACILITIES IN BERKS COUNTY. UWBC'S INVESTMENT INCLUDES OPERATIONAL SUPPORT AS WELL TO CONTINUE TO BUILD

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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PROGRAM CAPACITY. IN 2023, CASA SERVED OVER 100 CHILDREN WITH THE SUPPORT OF 50 VOLUNTEERS.

-- CATHOLIC CHARITIES: DIOCESE OF ALLENTOWN, CASE MANAGEMENT AND COUNSELING FOR VETERANS AND THEIR FAMILIES: VETERANS ARE ASSESSED BY A CASE MANAGER TO DETERMINE THEIR IMMEDIATE NEEDS. A SERVICE PLAN IS CREATED TO IDENTIFY THE GOALS AND ACTION STEPS. THE CASE MANAGER WORKS WITH THE VETERAN TO ACCOMPLISH THESE GOALS, WHICH MAY INCLUDE JOB SEARCH, BUDGET COUNSELING AND GUIDANCE, REFERRAL TO BERKS COUNTY VETERAN'S ADMINISTRATION FOR SPECIFIC ASSISTANCE/ENTITLEMENTS, ASSISTANCE WITH APPLICATIONS FOR SUBSIDIZED HOUSING, FOOD STAMPS, AND OTHER LOW-INCOME PROGRAMS FOR WHICH THE VETERAN MAY BE ELIGIBLE.

-- CENTRO HISPANO DANIEL TORRES, INC., INFORMATION AND REFERRAL: THE MAJORITY OF CENTRO HISPANO'S CLIENTS ARE EITHER UNEMPLOYED OR UNDEREMPLOYED. THEY ARE SEEKING ASSISTANCE OR SERVICES TO HELP THEM IN IMPROVING THE QUALITY OF LIFE FOR THEM AND FOR THEIR FAMILIES. INFORMATION AND REFERRAL, INCLUDES CLIENT/SYSTEM ADVOCACY, TRANSLATION AND INTERPRETATION, AND ASSISTANCE AND SUPPORT WITH COMPLETING DOCUMENTATION. CENTRO HISPANO ALSO PROVIDES SUPPORT WITH HELPING CLIENTS APPLY FOR BENEFITS THROUGH THE STATE'S COMPASS SYSTEM.

-- FAMILY PROMISE OF BERKS COUNTY, INC., U-TURN HELPS KEEP YOUTH OFF THE STREETS, AND THE PROGRAM'S CASE MANAGER HELPS YOUTH FOCUS ON ACHIEVING EDUCATIONAL, EMPLOYMENT AND HOUSING STABILIZATION GOALS.

-- FRIEND, INC. COMMUNITY SERVICES, COMMUNITY RESOURCE CONNECTIONS: SERVING THE KUTZTOWN AREA, CLIENTS ARE REFERRED BY CHURCHES, SCHOOLS, OTHER AGENCIES OR NEIGHBORS. THE CASE MANAGER MEETS WITH THE CLIENT TO DETERMINE WHAT SERVICES ARE NEEDED AND WHAT THE CLIENT QUALIFIES FOR. IF THERE IS AN IMMEDIATE CRISIS, THE CASE MANAGER WILL WORK WITH THE CLIENT TO ADDRESS THE ISSUE. IT COULD INCLUDE EMERGENCY FOOD,

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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ASSISTANCE WITH RENT, HEAT AND ELECTRICITY. THE CLIENT IS REFERRED TO OTHER AGENCIES AND/OR CONNECTED TO OTHER SERVICES DEPENDING ON THEIR NEEDS.

COMMUNITY COLLABORATION

PA 211 INFORMATION AND REFERRAL

THE PA 211 SERVICE PROVIDES PEOPLE WITH INFORMATION ABOUT ESSENTIAL HUMAN SERVICES. WHEN THE COVID-19 PANDEMIC BEGAN IN MARCH 2020, PA 211 SAW A SIGNIFICANT INCREASE IN CALLS. TOP NEEDS WERE RELATED TO FOOD AND HOUSING/UTILITY ASSISTANCE. FAMILIES WERE ABLE TO IDENTIFY VIRTUAL LEARNING SUPPORTS. PA 211 CAN ASSIST FAMILIES WITH LOCATING CHILDCARE, FINDING QUALITY CARE FOR AGING PARENTS, OR JOB TRAINING PROGRAMS. PA 211 CENTERS ARE STAFFED BY TRAINED SPECIALISTS WHO ASSESS THE CALLERS' NEEDS AND REFER THEM TO THE HELP THEY SEEK. IN ADDITION, THE CALL CENTER SPECIALISTS, SEVERAL POSSESSING BILINGUAL SKILLS, FACILITATE CALLS AND QUESTIONS FROM THOSE INTERESTED IN VOLUNTEERING OR DONATING ITEMS, SUCH AS FOOD AND CLOTHING.

PA 211 SERVES AS A VALUED COMMUNITY RESOURCE AND SERVES AS A VITAL CONNECTION FOR THOSE NEEDING HELP, AS WELL AS FOR THOSE WANTING TO GIVE HELP. ADDITIONALLY, PA 211 IS A USEFUL PLANNING TOOL SINCE IT PROVIDES REAL TIME INFORMATION ABOUT THE SCOPE OF ISSUES LOCAL PEOPLE ARE FACING.

IN 2023, 17,970 CONTACTS -- CALLS/WEB VISITS/TEXTS/EMAILS WERE RECEIVED FROM BERKS RESIDENTS. THAT WAS A 26% INCREASE IN USAGE FROM 2022. TOP NEEDS REQUESTED WERE HOUSING ASSISTANCE (5,533), UTILITY ASSISTANCE (3,813) AND FOOD/MEALS (788).

PA 211 PHONE SERVICE IS AVAILABLE 24 HOURS A DAY, 7 DAYS A WEEK, 365 DAYS A YEAR. ONLINE SEARCH CAPABILITY OF THE PA 211 DATABASE IS ALSO

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

AVAILABLE AT WWW.PA211EAST.ORG. ASSISTANCE THROUGH TEXTING IS AVAILABLE
 MONDAY-FRIDAY, 8AM TO 4PM; ONE CAN TEXT THEIR ZIP CODE TO 898211.

FORM 990, PART VI, SECTION A, LINE 2:

THE FOLLOWING BOARD MEMBERS ARE RELATED:

SUE AND CRAIG PERROTY SPOUSES

A MARRIED COUPLE MAINTAIN POSITIONS ON THE UNITED WAY OF BERKS COUNTY BOARD
 OF DIRECTORS. THIS SITUATION OCCURS BECAUSE IT IS A COMMON PRACTICE FOR A
 HUSBAND AND WIFE TEAM TO SERVE AS CO-CHAIRS OF THE ANNUAL FUND-RAISING
 CAMPAIGN, WHICH HAS BEEN A VERY SUCCESSFUL AND POPULAR APPROACH WITH THE
 VOLUNTEERS. THE COUPLES REPRESENT PAST AND/OR CURRENT AND/OR FUTURE
 CAMPAIGN CO-CHAIRS.

NO OTHER BOARD MEMBERS ARE RELATED.

FORM 990, PART VI, SECTION B, LINE 11B:

FORM 990 IS REVIEWED AND APPROVED BY THE GOVERNANCE COMMITTEE AND REPORTED
 TO THE BOARD OF DIRECTORS ANNUALLY PRIOR TO SUBMISSION. ALL BOARD MEMBERS
 RECEIVE A COPY OF THE FORM 990.

FORM 990, PART VI, SECTION B, LINE 12C:

DISCLOSURE OF ACTUAL OR POTENTIAL CONFLICTS OF INTEREST

AN INTERESTED PARTY IS UNDER A CONTINUING OBLIGATION TO DISCLOSE ANY ACTUAL
 OR POTENTIAL CONFLICT OF INTEREST AS SOON AS IT IS KNOWN, OR REASONABLY
 SHOULD BE KNOWN.

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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AN INTERESTED PARTY SHALL COMPLETE A QUESTIONNAIRE/DISCLOSURE STATEMENT, IN THE FORM ATTACHED, TO DISCLOSE THE MATERIAL FACTS FULLY AND COMPLETELY ABOUT ANY ACTUAL OR POTENTIAL CONFLICTS OF INTEREST. THE DISCLOSURE STATEMENT SHALL BE COMPLETED UPON HIS OR HER ASSOCIATION WITH UNITED WAY OF BERKS COUNTY AND SHALL BE UPDATED ANNUALLY. AN ADDITIONAL DISCLOSURE STATEMENT SHALL BE COMPLETED AT SUCH TIMES AS AN ACTUAL POTENTIAL CONFLICT ARISES.

FOR BOARD MEMBERS, THE DISCLOSURE STATEMENTS SHALL BE PROVIDED TO THE PRESIDENT, WHO WILL REVIEW THE DISCLOSURE STATEMENTS AND PRESENT A SUMMARY OF THE FINDINGS TO THE GOVERNANCE COMMITTEE. THE GOVERNANCE COMMITTEE SHALL REVIEW THE SUMMARY OF THE FINDINGS PREPARED BY THE PRESIDENT AND PRESENT A REPORT TO THE EXECUTIVE COMMITTEE IN THE SPRING OF EACH YEAR.

IN THE CASE OF IDENTIFIED VOLUNTEERS, THE DISCLOSURES SHALL BE PROVIDED TO THE PRESIDENT WHO WILL REVIEW THE DISCLOSURE STATEMENTS. AS NEEDED A SUMMARY OF FINDINGS WILL BE SHARED WITH THE GOVERNANCE COMMITTEE.

IN THE CASE OF STAFF, THE DISCLOSURE STATEMENTS SHALL BE PRESENTED TO THE PRESIDENT WHO WILL REVIEW THE DISCLOSURE STATEMENTS AND PRESENT A SUMMARY OF THE FINDINGS TO THE EXECUTIVE COMMITTEE. NEW HIRE AND CHANGES WITH STAFF SHALL BE REVIEWED AS RECEIVED. THE PRESIDENT SHALL PROVIDE HIS/HER DISCLOSURE STATEMENT TO THE CHAIRMAN OF THE BOARD.

THE PRESIDENT SHALL FILE THE VOLUNTEER DISCLOSURE STATEMENTS WITH THE OFFICIAL CORPORATE RECORDS OF UNITED WAY OF BERKS COUNTY. THE SENIOR VICE PRESIDENT FINANCE & ADMINISTRATION SHALL FILE THE STAFF DISCLOSURE

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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STATEMENTS WITH OTHER EMPLOYEE RECORDS.

GENERAL PROCEDURES FOR THE REVIEW OF ACTUAL OR POTENTIAL CONFLICTS

WHENEVER THERE IS REASON TO BELIEVE THAT AN ACTUAL OR POTENTIAL CONFLICT OF INTEREST EXISTS BETWEEN UNITED WAY OF BERKS COUNTY AND AN INTERESTED PARTY, THE BOARD OF DIRECTORS, UPON THE RECOMMENDATION OF THE EXECUTIVE COMMITTEE OR THE GOVERNANCE COMMITTEE, SHALL DETERMINE THE APPROPRIATE ORGANIZATIONAL RESPONSE. THIS SHALL INCLUDE, BUT IS NOT NECESSARILY LIMITED TO, INVOKING THE PROCEDURES DESCRIBED IN SECTION V BELOW, WITH RESPECT TO A SPECIFIC PROPOSED ACTION OR TRANSACTION.

WHERE THE ACTUAL OR POTENTIAL CONFLICT INVOLVES AN EMPLOYEE OF UNITED WAY OF BERKS COUNTY OTHER THAN THE PRESIDENT, THE PRESIDENT SHALL, IN THE FIRST INSTANCE, BE RESPONSIBLE FOR REVIEWING THE MATTER AND MAY TAKE APPROPRIATE ACTION AS NECESSARY TO PROTECT THE INTERESTS OF UNITED WAY OF BERKS COUNTY. THE PRESIDENT SHALL DETERMINE WHETHER THE RESULTS OF ANY REVIEW AND ACTION SHALL BE REPORTED TO THE CHAIRPERSON. WHEN REPORTED TO THE CHAIRPERSON, THE CHAIRPERSON, IN CONSULTATION WITH THE EXECUTIVE COMMITTEE, SHALL DETERMINE IF ANY FURTHER BOARD REVIEW OR ACTION IS REQUIRED.

PROCEDURES FOR ADDRESSING CONFLICTS OF INTEREST - SPECIFIC TRANSACTIONS

WHERE AN ACTUAL OR POTENTIAL CONFLICT EXISTS BETWEEN THE INTERESTS OF UNITED WAY OF BERKS COUNTY AND AN INTERESTED PARTY WITH RESPECT TO A SPECIFIC PROPOSED ACTION OR TRANSACTION, THE UNITED WAY OF BERKS COUNTY SHALL REFRAIN FROM THE PROPOSED ACTION ON TRANSACTION UNTIL SUCH TIME AS THE PROPOSED ACTION OR TRANSACTION HAS BEEN APPROVED BY THE DISINTERESTED

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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MEMBERS OF THE BOARD OF DIRECTORS OF THE ORGANIZATION. THE FOLLOWING PROCEDURES MAY APPLY:

- AN INTERESTED PARTY WHO HAS AN ACTUAL OR POTENTIAL CONFLICT OF INTEREST WITH RESPECT TO A PROPOSED ACTION OR TRANSACTION OF THE ORGANIZATION SHALL NOT PARTICIPATE, AND MAY BE EXCUSED FROM THE DELIBERATIONS AND DECISION MAKING, WITH RESPECT TO SUCH ACTION OR TRANSACTION. UPON REQUEST BY THE BOARD, THE INTERESTED PARTY MAY ANSWER QUESTIONS OR PROVIDE MATERIAL OR FACTUAL INFORMATION ABOUT THE PROPOSED ACTION OR TRANSACTION.

- THE DISINTERESTED MEMBERS OF THE BOARD OF DIRECTORS MAY APPROVE THE PROPOSED ACTION OR TRANSACTION UPON FINDING THAT IT IS IN THE BEST INTERESTS OF UNITED WAY OF BERKS COUNTY. THE BOARD SHALL CONSIDER WHETHER THE TERMS OF THE PROPOSED TRANSACTION ARE FAIR AND REASONABLE TO THE UNITED WAY OF BERKS COUNTY AND WHETHER IT WOULD BE POSSIBLE, WITH REASONABLE EFFORT, TO FIND A MORE ADVANTAGEOUS ARRANGEMENT WITH A PARTNER OR ENTITY THAT IS NOT AN INTERESTED PARTY.

- APPROVAL BY THE DISINTERESTED MEMBERS OF THE BOARD OF DIRECTORS SHALL BE BY VOTE OF A MAJORITY OF DIRECTORS IN ATTENDANCE AT A REGULAR OR SPECIAL MEETING OF THE BOARD OF DIRECTORS. AN INTERESTED PARTY SHALL NEITHER BE COUNTED FOR PURPOSES OF DETERMINING WHETHER A QUORUM IS PRESENT NOR FOR THE PURPOSES OF DETERMINING WHAT CONSTITUTES A MAJORITY VOTE OF DIRECTORS IN ATTENDANCE.

- THE MINUTES OF THE MEETING SHALL REFLECT THAT THE CONFLICT DISCLOSURE WAS MADE, THE VOTE TAKEN AND, WHERE APPLICABLE, THE ABSTENTION FROM VOTING AND PARTICIPATION BY THE INTERESTED PARTY.

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

VIOLATIONS OF CONFLICT OF INTEREST POLICY

IF THE BOARD OF DIRECTORS HAS REASON TO BELIEVE THAT AN INTERESTED PARTY HAS FAILED TO DISCLOSE AN ACTUAL OR POTENTIAL CONFLICT OF INTEREST, IT SHALL INFORM THE PERSON OF THE BASIS FOR SUCH BELIEF AND AFFORD THE PERSON AN OPPORTUNITY TO EXPLAIN THE ALLEGED FAILURE TO DISCLOSE.

IF, AFTER HEARING THE RESPONSE OF THE INTERESTED PARTY AND MAKING SUCH FURTHER INVESTIGATION, AS MAY BE WARRANTED IN THE CIRCUMSTANCES, THE BOARD DETERMINES THAT THE INTERESTED PARTY HAS, IN FACT, FAILED TO DISCLOSE AN ACTUAL OR POSSIBLE CONFLICT OF INTEREST, IT SHALL TAKE APPROPRIATE CORRECTIVE ACTION.

FORM 990, PART VI, SECTION B, LINE 15:

EXECUTIVE COMPENSATION PROCEDURES:

UNITED WAY OF BERKS COUNTY'S PRIMARY OBJECTIVE IS TO PROVIDE A REASONABLE AND COMPETITIVE EXECUTIVE COMPENSATION OPPORTUNITY CONSISTENT WITH COMPENSATION PRACTICES FOR INDIVIDUALS POSSESSING THE EXPERIENCE AND SKILLS NEEDED TO IMPROVE THE OVERALL PERFORMANCE OF THE ORGANIZATION.

THE ORGANIZATION'S EXECUTIVE COMPENSATION PHILOSOPHY IS DESIGNED TO:

- ENCOURAGE THE ATTRACTION AND RETENTION OF A HIGH CALIBER EXECUTIVE
- REINFORCE THE GOALS FOR THE ORGANIZATION BY SUPPORTING TEAMWORK AND COLLABORATION
- ENSURE THAT PAY IS PERCEIVED TO BE FAIR AND EQUITABLE
- BE FLEXIBLE TO REWARD INDIVIDUAL ACCOMPLISHMENTS AS WELL AS

ORGANIZATIONAL SUCCESS

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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- ENSURE THAT THE PROGRAM IS EASY TO EXPLAIN, UNDERSTAND AND ADMINISTER

- BALANCE THE NEED TO BE COMPETITIVE WITH THE LIMITS OF AVAILABLE

FINANCIAL RESOURCES

THE CHAIRPERSON OF THE BOARD LEADS THE BOARD OF DIRECTORS IN THE EVALUATION OF THE PRESIDENT'S PERFORMANCE ON AN ANNUAL BASIS. THE PRESIDENT PRESENTS TO THE CHAIRPERSON INFORMATION ON THE ACCOMPLISHMENTS OF THE ORGANIZATION AND ITS PROGRESS TOWARD ACHIEVING THE GOALS OUTLINED IN THE STRATEGIC PLAN, THE FULFILLMENT OF HIS/HER DUTIES AND RESPONSIBILITIES AS OUTLINED IN THE POSITION DESCRIPTION, AND THE MANNER IN WHICH THE CHALLENGES OF THE ORGANIZATION HAVE BEEN ADDRESSED AND THE OPPORTUNITIES TAKEN. THE PRESIDENT ALSO DEFINES AND DISCUSSES CURRENT AND FUTURE ORGANIZATIONAL CHALLENGES AND OPPORTUNITIES. THIS INFORMATION IS SHARED WITH THE BOARD OF DIRECTORS.

IN ADDITION TO THE ANNUAL REVIEW, A PRESIDENT'S EVALUATION SURVEY IS CONDUCTED ON A BIENNIAL BASIS WITH FULL BOARD PARTICIPATION, THE RESULTS OF WHICH ARE COMPILED AND ANALYZED BY A THIRD-PARTY PROVIDER HAVING NO VESTED INTEREST IN THE OUTCOME OF THIS PROCESS. A FORMAL REPORT IS PRESENTED BY THE PROVIDER FIRST TO THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS FOR INITIAL DISCUSSION, THEN TO THE FULL BOARD OF DIRECTORS AS PART OF AN EXECUTIVE SESSION.

FOLLOWING THIS SESSION, THE CHAIRPERSON MEETS WITH THE PRESIDENT AND SHARES THE RESULTS OF THE GROUP EVALUATION AS WELL AS ANY GOALS OR SUGGESTIONS THE BOARD HAS RELATIVE TO THE INFORMATION PRESENTED AND THE FUTURE DIRECTION OF THE ORGANIZATION. THE CHAIRPERSON OF THE BOARD COMMUNICATES THE RESULTS OF THE ASSESSMENT VERBALLY TO THE PRESIDENT AND THE INFORMATION IS CAPTURED

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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THROUGH THE MINUTES OF THE EXECUTIVE SESSIONS FOR EXECUTIVE COMMITTEE AND THE BOARD OF DIRECTORS. THE RESULTS OF THE ASSESSMENT ARE INCLUDED IN THE PRESIDENT'S PERSONNEL FILE.

THE LEVEL AND FORM OF COMPENSATION IS DETERMINED FOLLOWING A REVIEW OF LOCAL COMPENSATION LEVELS OF CEO'S OF ORGANIZATIONS OF SIMILAR SIZE AND SCOPE, AS WELL AS THE COMPENSATION LEVELS OF CEO'S OF UNITED WAY ORGANIZATIONS OF SIMILAR SIZE AND SCOPE. WHILE UNITED WAY FOCUSES ON OTHER UNITED WAYS AND NONPROFITS TO BENCHMARK COMPENSATION, THE ORGANIZATION UNDERSTANDS THAT THE MARKET FOR EXECUTIVE TALENT MAY BE BROADER THAN THE GROUP OF CHARITIES. MARKET INFORMATION FROM ADDITIONAL MARKET SEGMENTS AND PUBLISHED NOT-FOR-PROFIT COMPENSATION SURVEYS, MAY BE USED AS A SUPPLEMENT. THE PRESIDENT'S ANNUAL COMPENSATION IS COMMUNICATED BOTH VERBALLY AND IN WRITING TO THE PRESIDENT AND IS INCLUDED IN HIS/HER PERSONNEL FILE.

KEY EMPLOYEE COMPENSATION PROCEDURES:

COMPENSATION PROCEDURES FOR KEY EMPLOYEES OF UNITED WAY OF BERKS COUNTY FOLLOW THE ORGANIZATION'S SALARY AND ADMINISTRATION PROGRAM AND THE PERSONNEL POLICIES AS PROVIDED TO ALL STAFF.

THE COMPETITIVENESS OF THE SALARY STRUCTURE AT UNITED WAY OF BERKS COUNTY WILL BE ASSESSED PERIODICALLY, AS DETERMINED BY THE PRESIDENT, BUT NOT MORE THAN EVERY THREE YEARS, BASED ON SURVEYS OF SALARIES PAID BY OTHER EMPLOYERS FOR SIMILAR WORK. AN OUTSIDE HUMAN RESOURCES FIRM NORMALLY DOES THE ASSESSMENT. IF THERE IS EVIDENCE OF A CHANGE IN GENERAL SALARY LEVELS, THE SALARY RANGES ARE ADJUSTED ACCORDING TO THE PROGRAM'S OBJECTIVES, WITH THE APPROVAL OF THE EXECUTIVE COMMITTEE (SEE BELOW). THESE ADJUSTMENTS DO

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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NOT CHANGE THE GRADES TO WHICH POSITIONS ARE ASSIGNED AND DO NOT RESULT IN AUTOMATIC CHANGES IN INDIVIDUAL SALARIES.

THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS, SITTING AS THE PERSONNEL COMMITTEE, SHALL REVIEW AND APPROVE THE SALARY STRUCTURE. THE REVIEW AND APPROVAL NORMALLY FOLLOWS THE ASSESSMENT DONE BY AN OUTSIDE HUMAN RESOURCES FIRM TO DETERMINE WHETHER CHANGES HAVE OCCURRED IN THE GENERAL SALARY LEVELS. THE EXECUTIVE COMMITTEE WILL DETERMINE IF A REPORT ON THE ORGANIZATION'S COMPENSATION PLAN/SALARY STRUCTURE SHALL BE MADE TO THE FULL BOARD OF DIRECTORS.

UNITED WAY OF BERKS COUNTY'S POLICY IS THAT SALARY INCREASES ARE BASED ON MERIT AND SHOULD REFLECT AN EMPLOYEE'S CONTRIBUTION TO THE ORGANIZATION IN RELATION TO THE RESPONSIBILITIES OF HIS OR HER POSITION. SALARY INCREASES MAY BE LIMITED BY THE AVAILABILITY OF FUNDS. THE SALARY ADMINISTRATION PROGRAM, THEREFORE, HAS BEEN DESIGNED TO PROVIDE THE BEST PERFORMERS WITH HIGHER PERCENTAGES OF MERIT INCREASES. WITH THE EXCEPTION OF SPECIAL TYPES OF SALARY ADJUSTMENTS, MERIT INCREASES ARE THE ONLY TYPE OF SALARY INCREASES NORMALLY GRANTED.

FORM 990, PART VI, SECTION C, LINE 19:

COMPLIANCE WITH PUBLIC INSPECTION REQUIREMENTS:

IN GENERAL, EXEMPT ORGANIZATIONS MUST MAKE AVAILABLE FOR PUBLIC INSPECTION CERTAIN ANNUAL RETURNS AND APPLICATIONS FOR EXEMPTION, AND MUST PROVIDE COPIES OF SUCH RETURNS AND APPLICATIONS TO INDIVIDUALS WHO REQUEST THEM. IN COMPLIANCE WITH THIS REQUIREMENT, UNITED WAY OF BERKS COUNTY ADHERES TO THE FOLLOWING:

- IN RESPONSE TO A WRITTEN REQUEST AT THE PRINCIPAL OFFICE OF UNITED WAY

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
--	--

OF BERKS COUNTY, A COPY OF THE COVERED TAX DOCUMENTS SHALL BE PROVIDED TO THE REQUESTER WITHIN THIRTY (30) DAYS. PER IRS GUIDANCE, A REQUEST THAT IS FAXED, E-MAILED OR SENT BY PRIVATE COURIER IS CONSIDERED A WRITTEN REQUEST.

- IN RESPONSE TO AN IN-PERSON REQUEST AT THE PRINCIPAL OFFICE OF UNITED WAY OF BERKS COUNTY, A COPY OF THE COVERED TAX DOCUMENTS SHALL GENERALLY BE PROVIDED THE DAY OF THE REQUEST.

- REQUESTS EITHER IN-PERSON OR WRITTEN SHALL BE PROVIDED INFORMATION THAT OFFERS THE REQUESTOR THE OPPORTUNITY TO ACCESS THE DOCUMENTS FREE OF CHARGE VIA THE WEB, OR AT A COST SHOULD A HARD COPY BE REQUESTED.

- UNITED WAY OF BERKS COUNTY SHALL CHARGE A REASONABLE FEE FOR COPYING COSTS AND THE ACTUAL COST OF POSTAGE BEFORE PROVIDING COPIES OF THE DOCUMENTS. REASONABLE FEES FOR COPYING ARE CONSISTENT WITH THE IRS STANDARD CHARGE OF NO MORE THAN \$.20 PER PAGE, WHILE POSTAGE FEES SHALL BE THE ACTUAL COST INCURRED BY THE ORGANIZATION.

- TIMELY NOTICE OF THE APPROXIMATE COST AND ACCEPTABLE FORM OF PAYMENT WILL BE PROVIDED WITHIN SEVEN DAYS OF RECEIPT OF THE REQUEST IF IN WRITING OR IMMEDIATELY UPON A REQUEST FROM AN IN-PERSON REQUEST. ACCEPTABLE FORMS OF PAYMENT INCLUDE CASH AND MONEY ORDER (IN THE CASE OF AN IN-PERSON REQUEST) AND CERTIFIED CHECK, MONEY ORDER, AND PERSONAL CHECK OR CREDIT CARD, IN THE CASE OF A WRITTEN REQUEST. PAYMENT IN FULL IS DUE PRIOR TO PROVIDING COPIES.

- THE NAMES OR ADDRESSES OF THE ORGANIZATION'S CONTRIBUTORS ON ITS ANNUAL RETURN SHALL NOT BE DISCLOSED IN ACCORDANCE WITH IRS REGULATIONS.

PUBLIC INSPECTION OF GOVERNING DOCUMENTS:

UNITED WAY OF BERKS COUNTY IS COMMITTED TO OPENNESS AND TRANSPARENCY TO DONORS/FUNDERS, PARTNER AGENCIES, GOVERNMENTAL ORGANIZATIONS, ITS VARIOUS STAKEHOLDERS, AND THE GENERAL PUBLIC. PROACTIVE DISCLOSURE AND

Name of the organization

UNITED WAY OF BERKS COUNTY, INC.

Employer identification number

23-1655375

DISSEMINATION OF INFORMATION CONCERNING THE GOVERNANCE, OPERATIONS, AND FINANCIAL INFORMATION CONCERNING UNITED WAY OF BERKS COUNTY IS AVAILABLE.

THE FOLLOWING DOCUMENTS ARE ACCESSIBLE FOR PUBLIC INSPECTION AT THE OFFICE OF UNITED WAY OF BERKS COUNTY:

- ALL DOCUMENTS AS REQUIRED BY FEDERAL, STATE, AND LOCAL LAW, INCLUDING BUT NOT LIMITED TO THE IRS FORM 990.

- ANNUAL REPORT

- ARTICLES OF INCORPORATION

- AUDITED FINANCIAL STATEMENTS

- CAMPAIGN HIGHLIGHTS REPORT

- COMUNITY IMPACT REPORTS

- READY.SET.READ! REPORTS

- CODE OF ETHICS AND CONDUCT AND WHISTLEBLOWER POLICY

- RECORD RETENTION

- CONFLICT OF INTEREST POLICY

- ORGANIZATIONAL BY-LAWS

- MISSION STATEMENT

- VISION STATEMENT

PERSONS REQUESTING HARD COPIES OF DOCUMENTS SHALL BE PROVIDED INFORMATION THAT OFFERS THE REQUESTOR THE OPPORTUNITY TO ACCESS THE INFORMATION FREE OF CHARGE VIA THE WEB. UNITED WAY OF BERKS COUNTY SHALL CHARGE A REASONABLE FEE FOR COPYING COSTS AND THE ACTUAL COST OF POSTAGE BEFORE PROVIDING COPIES OF THE DOCUMENTS IF A HARD COPY IS REQUESTED. REASONABLE FEES FOR COPYING ARE CONSISTENT WITH THE IRS STANDARD CHARGE OF NO MORE THAN \$.20 PER PAGE WHILE POSTAGE FEES SHALL BE THE ACTUAL COST INCURRED BY THE ORGANIZATION.

Name of the organization UNITED WAY OF BERKS COUNTY, INC.	Employer identification number 23-1655375
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THE FOLLOWING DOCUMENTS ARE ACCESSIBLE VIA UNITED WAY OF BERKS COUNTY
WEB-SITE AT WWW.UWBERKS.ORG.

- ANNUAL REPORT
- AUDITED FINANCIAL STATEMENTS
- CAMPAIGN HIGHLIGHTS REPORT
- CODE OF ETHICS AND CONDUCT AND WHISTLEBLOWER POLICY
- FORM 990
- MISSION STATEMENT
- VISION STATEMENT

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

UNREALIZED GAIN/LOSS ON BENEFICIAL INTEREST	59,449.
TRANSFERS BETWEEN NET ASSET RESTRICTIONS	-122,054.
CHANGE IN DONOR DESIGNATIONS	-322,777.
TOTAL TO FORM 990, PART XI, LINE 9	-385,382.

**Application for Extension of Time To File an Exempt Organization
Return or Excise Taxes Related to Employee Benefit Plans**

Department of the Treasury
Internal Revenue Service

File a separate application for each return.
Go to www.irs.gov/Form8868 for the latest information.

Electronic filing (e-file). You can electronically file Form 8868 to request up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Part I - Identification

Type or Print <small>File by the due date for filing your return. See instructions.</small>	Name of exempt organization, employer, or other filer, see instructions. UNITED WAY OF BERKS COUNTY, INC.	Taxpayer identification number (TIN) 23-1655375
	Number, street, and room or suite no. If a P.O. box, see instructions. 25 N. 2ND STREET, SUITE 101	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. READING, PA 19601	

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 4720 (other than individual)	09
Form 4720 (individual)	03	Form 5227	10
Form 990-PF	04	Form 6069	11
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08		

• After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.

• If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name _____
 Plan Number _____
 Plan Year Ending (MM/DD/YYYY) _____

Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions)

The books are in the care of **MONICA RUANO-WENRICH**
25 N. 2ND STREET, SUITE 101 - READING, PA 19601

Telephone No. **(610) 685-4550** Fax No. _____

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four-digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and TINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **NOVEMBER 15**, 20 **24**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
 calendar year 20 **23** or
 tax year beginning _____, 20 _____, and ending _____, 20 _____

2 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return
 Change in accounting period

3a If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Mail to:

Pennsylvania Department of State
Bureau of Corporations and Charitable Organizations
401 North St Rm 207
Harrisburg, PA 17120

See www.dos.pa.gov/charities for more information

Charitable Organization Registration Statement

BCO-10 (rev. 11/2023)

Fee: See instructions

Certificate number: 01450
(N/A if initial registration)

Fiscal year ended: 12/31/2023
MM DD YYYY

FEIN: 23-1655375

If this is a voluntary registration, check and complete the applicable box(es). For a registration to be voluntary, at least one of the following must apply:

Organization is exempt from registration because

Organization does not solicit contributions in Pennsylvania

1. Legal name of organization: UNITED WAY OF BERKS COUNTY, INC.

Check if name change and give previous name _____

2. All other names used to solicit contributions: _____

N/A

3. Contact person: MONICA RUANO-WENRICH Contact's e-mail: MONICAR@UWBERKS.ORG

4. Principal address of organization: _____ Mailing address (if different than principal address): _____

25 N. 2ND STREET, SUITE 101

READING

PA 19601

County: BERKS

Phone number: (610) 685-4550

800 number: _____

Fax number: _____

Email (if different than Contact's email): _____

Website: WWW.UWBERKS.ORG

Item 5 to be completed by initial registrants only

5. Type of organization (e.g. non-profit corporation, unincorporated association, etc.):
NON-PROFIT CORPORATION

Where established: BERKS COUNTY

Date established:* 01/01/1963

*Initial registrants must submit copies of organizational documents such as charter, articles of incorporation, constitution or other organizational instrument and by-laws.

UNITED WAY OF BERKS COUNTY, INC.

6. Name and addresses of all offices, chapters, branches, auxiliaries, affiliates or other subordinate units located in Pennsylvania, which share in the contributions or other revenue raised in the Commonwealth: (Attach a separate sheet if necessary)

Not Applicable

N/A

7. Short form registration applicability - Specified types of charitable organizations described in §162.7(a) of the Act may file a short form registration, which permits the organization to register without filing a financial report. Check the section that describes the organization. If the organization does not meet any of the criteria below for short form registration, check "Not Applicable":

§162.7(a)(1) - Persons or organizations which solicit contributions for the relief of a specific individual, when all of the contributions collected are turned over to the named beneficiary for his/her use without any deductions and provided that all contributions collected shall be held in trust

§162.7(a)(2) - Organizations which only solicit within the membership of the organization by other members of the organization. The term "membership" shall not include those persons who are granted a membership solely upon making a contribution as the result of solicitation. "Member" means a person having membership in a nonprofit corporation, or other organization, in accordance with the provisions of its articles of incorporation, bylaws or other instruments creating its form and organization and having bona fide rights and privileges in the organization such as the right to vote, to elect officers and directors, to hold office or position as ordinarily conferred on members of such organizations.

§162.7(a)(3) - Organizations which receive gross contributions of no more than \$25,000 per fiscal year whose fundraising activities are carried on only by volunteers, members, officers or permanent employees and only permanent employees are compensated for those fundraising activities

§162.7(a)(4) - Veterans organizations chartered under Federal law, organizations of volunteer firemen, ambulance associations, rescue squad associations and their auxiliaries or affiliates, which are not exempt from registration, did not receive gross contributions in excess of \$100,000 and did not use a professional solicitor.

Not Applicable

Charitable organizations which check boxes §162.7(a)(1) - §162.7(a)(4) are not required to file a financial report with this registration. If "Not Applicable" is checked, the charitable organization must submit financial reports which are audited, reviewed, compiled or internally prepared. See Instructions.

Items 8 and 9 are required to be completed by initial registrants only

8. Date organization first solicited contributions from Pennsylvania residents: _____
MM DD YYYY

Other _____

9. If organization solicited Pennsylvania residents and received gross* contributions totaling more than \$25,000 in any given fiscal year, provide the date the organization first received contributions totaling more than \$25,000.

MM DD YYYY

Other _____

*Includes contributions received both within and outside Pennsylvania before any deductions or expenses.

UNITED WAY OF BERKS COUNTY, INC.

10. Has the organization been granted IRS tax-exempt status? Yes No

A. If "Yes," under which IRS code section: 501(C)(3) and attach a copy of the IRS exemption letter if not previously submitted.

B. Has the organization's tax-exempt status ever been denied, revoked or modified? Yes No (If "Yes," attach a copy of the denial, revocation or modification and subsequent reinstatement, if any, and if not previously submitted.)

11. Was the organization required to file any type of IRS 990 return, including 990, 990EZ, 990PF or 990N and applicable schedules, for its most recently completed fiscal year? Yes No

(If "Yes," attach a copy of the most recently filed 990, 990EZ, 990PF or 990N and include all schedules. If "No," attach an explanation of why the organization is exempt from filing an IRS 990 return. An organization that is not required to file an IRS 990 return or an organization that files a 990N, 990EZ or 990PF, must file a Pennsylvania public disclosure form (BCO-23).)

12. Manner in which contributions are solicited (e.g. direct mail, telephone, internet, social media, etc.):

Does not solicit contributions

DIRECT MAIL, CORPORATE PRESENTATIONS/MEETINGS, PERSONAL SOLICITATION

13. A clear description of the specific programs for which contributions are used or will be used, and a statement describing whether such programs are planned or in existence.

FUNDRAISING AND OTHER FINANCIAL DEVELOPMENT, COMMUNICATIONS, VOLUNTEER DEVELOPMENT, PLANNING, NEEDS AND SERVICES EVALUATION, COMMUNITY SERVICES/BUILDING ACTIVITIES, AND THE ALLOCATION AND DISTRIBUTION OF FUNDS TO MEET HUMAN SERVICES NEEDS.

14. Is the organization registered to solicit contributions in any other state or municipality?

Yes No (If "Yes," list all states and municipalities. Attach a separate sheet if necessary.)

15. Is any person compensated, or does the organization intend to compensate any person, who solicits contributions in Pennsylvania, including, but not limited to, employees of the organization and professional solicitors? (Do not check "Yes" if the organizations only uses or intend to only use a professional fundraising counsel.) Yes No

If "Yes," give the date the person or entity started or will start soliciting contributions from Pennsylvania residents: _____
Month Day Year

16. Names, addresses, and telephone numbers of all professional solicitors the organization uses or intends to use to solicit contributions from Pennsylvania residents. For each entry, include the beginning and ending dates of all contracts and dates Pennsylvania residents were first solicited, or will be solicited: (Attach a separate sheet if necessary)

Not Applicable

SEE STATEMENT 1

UNITED WAY OF BERKS COUNTY, INC.

17. Names, addresses, and telephone numbers of all professional fundraising counsel the organizations uses or intends to use to provide services with respect to the solicitation of contributions from Pennsylvania residents. For each entry, include the beginning and ending dates of all contracts and dates services began, or will begin, with respect to soliciting contributions from Pennsylvania residents: (Attach a separate sheet if necessary)

Not Applicable

SEE STATEMENT 2

18. Names, addresses, and telephone numbers of any commercial coventurers under contract with the organization: (Attach a separate sheet if necessary)

Not Applicable

NONE

19. If the registering charity is a parent organization located in Pennsylvania, does the organization elect to file a combined registration covering all of its Pennsylvania affiliates?

(See note "Affiliate and Parent Organization") Yes No Not Applicable

If "Yes," give all names and certificate numbers of the affiliate organizations:
(Each affiliate whose parent organization files an IRS 990 group return must submit a copy of the parent organization's 990 group return and file a public disclosure form (BCO-23) for each affiliate.)

20. Is the registering charity a Pennsylvania affiliate of a parent organization, which elected to file a combined registration on the registering charity's behalf? (See note "Affiliate and Parent Organization")

Yes No Not Applicable

If "Yes," provide the name and, if available, certificate number of the parent organization.
(Each affiliate whose parent organization files an IRS 990 group return must submit a copy of the parent organization's 990 group return and file a public disclosure form (BCO-23) for each affiliate.)

Legal name of parent organization

Pennsylvania certificate number

21. Provide the names and addresses of all officers, directors, trustees and principal salaried executive staff officers. (Attach separate sheet if necessary. A reference to the 990 or the BCO-23 is not sufficient.)

SEE STATEMENT 3

UNITED WAY OF BERKS COUNTY, INC.

22. Names of the individuals or officers of the organization who: (Attach a separate sheet if necessary)

A. Are in charge of solicitation activities:

BOARD OF DIRECTORS

25 N. 2ND STREET, SUITE 101 READING, PA 19601

B. Have final responsibility for the custody of contributions:

BOARD OF DIRECTORS

25 N. 2ND STREET, SUITE 101 READING, PA 19601

C. Have final responsibility for final distribution of contributions:

BOARD OF DIRECTORS

25 N. 2ND STREET, SUITE 101 READING, PA 19601

D. Are responsible for custody of financial records:

MONICA RUANO-WENRICH, SENIOR VP FINANCE AND ADMINISTRATION

25 N. 2ND STREET, SUITE 101 READING, PA 19601

23. Are any officers, directors, trustees, or employees related by blood, marriage, or adoption to:

A. Any other officer, director, trustee, or employee? Yes No **SEE STATEMENT 4**

B. Any officer, agent, or employee of any professional fundraising counsel or solicitor under contract with organization? ** Yes No

C. Any officers, agents or employees of any supplier or vendor providing goods or services? **
 Yes No

** (this includes any officer, director, trustee, or employee of the charitable organization who is also an officer, director, trustee, employee or owner of a professional fundraising counsel, professional solicitor, supplier or vendor)

If "Yes" is checked to any of the above, attach a list of related individuals including names, business, and residence addresses of related parties.

24. Has the organization or any of its present officers, directors, executive personnel or trustees ever:

A. Been found to have engaged in unlawful practices in the solicitation of contributions or administration of charitable assets or been enjoined from soliciting contributions or currently has such proceedings pending in this or any other jurisdiction? Yes No

B. Had its registration or license to solicit contributions denied, suspended, or revoked by any governmental agency? Yes No

C. Entered into any legally enforceable agreement (such as a consent agreement, an assurance of voluntary compliance or discontinuance or any similar agreement) with any district attorney, Office of Attorney General, or other local or state governmental agency? Yes No

(If "Yes" is checked in response to any of the above, attach a written explanation, including the reasons for actions, and copies of all relevant documents.)

UNITED WAY OF BERKS COUNTY, INC.

Certification - This registration statement must be signed by two different officers of the organization, one of whom shall be the chief fiscal officer or the equivalent.

I certify that the information provided in this registration, including all statements and attached documentation, is true and correct to the best of my knowledge, information and belief. I understand that the falsification of any statement or documentation made is subject to the penalties of 18 Pa.C.S. §4904 (relating to unsworn falsification to authorities) and 10 P.S. §162.17 (relating to administrative enforcement and penalties).

Signature of Chief Fiscal Officer

Date

Type or print name and title of Chief Fiscal Officer

Signature of Other Authorized Officer

Date

Type or print name and title of Other Authorized Officer

Checklist for registration:	
<input checked="" type="checkbox"/>	Completed registration statement properly signed and dated.
<input checked="" type="checkbox"/>	A copy of the IRS 990/990EZ/990PF/990N Return and required schedules, signed and dated by an authorized officer
<input type="checkbox"/>	Public Disclosure Form BCO-23 (if required)
<input checked="" type="checkbox"/>	Applicable Financial Statements (audited, reviewed, compiled or internally prepared)
<input checked="" type="checkbox"/>	Registration fee and any late filing fees
<input type="checkbox"/>	Initial Registrants Only: IRS determination letter, articles of incorporation or charter and by-laws.
See Instructions for more information on completing this form and attachments.	

FORM BCO-10

ALL PROFESSIONAL SOLICITORS

STATEMENT 1

NAME AND ADDRESS

PHONE NUMBER

NONE

CONTRACT BEGIN DATE

CONTRACT END DATE

SOLICIT DATE

FORM BCO-10

PROFESSIONAL FUNDRAISING COUNSELS

STATEMENT 2

NAME AND ADDRESS

PHONE NUMBER

NONE

CONTRACT BEGIN DATE

CONTRACT END DATE

SERVICE DATE

FORM BCO-10

OFFICERS, DIRECTORS, TRUSTEES AND EXECUTIVES

STATEMENT 3

NAME AND ADDRESS

TITLE

TAMMY L. WHITE
25 N. 2ND STREET, SUITE 101
READING, PA 19601

PRESIDENT

NAME AND ADDRESS

TITLE

MONICA RUANO-WENRICH
25 N. 2ND STREET, SUITE 101
READING, PA 19601

SR VP FINANCE & ADMIN

NAME AND ADDRESS

TITLE

SCOTT REHR
25 N. 2ND STREET, SUITE 101
READING, PA 19601

CHAIR

NAME AND ADDRESS

JONI NAUGLE
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

VICE CHAIR

NAME AND ADDRESS

CHRISTINA WEEBER
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

SECRETARY/TREASURER

NAME AND ADDRESS

RUTHANN WOLL
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

ASST. SECRETARY/TREASURER

NAME AND ADDRESS

JOHN ARNOLD
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

SARA AULESTIA
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

JOHN BOBO
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

JAMES BOSCOV
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

ANTHONY COX
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

KELLEY CROZIER, M.D.
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

MICHAEL DUFF
25 N. 2ND STREET, SUITE 101
READING, PA 19601

TITLE

DIRECTOR

NAME AND ADDRESS

TITLE

ROBERT FIRELY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

STEVEN FISHER
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

ROBERT GOONAN
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

TERRY GRASSLEY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

BRADLEY HALL
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

VICTORIA HAWKINS
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

ANNETTE HINES
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

JASON HOERR
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

MICHAEL KRUT
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

WESLIE LIANA
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR AS OF MAY

NAME AND ADDRESS

TITLE

DR. SUSAN LOONEY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

DR. JOSEPH MACHAROLA
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

NICK MARMONTELLO
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

DR. JENNIFER MURRAY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

MISSY ORLANDO
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

RENDY ORTIZ
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

CRAIG PERROTY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

SUE PERROTY
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

FRANCIS POST
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

SIDNEY PURNELL
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

MIKE REESE
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

ROBERTO SANCHEZ
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

ENGUITA MAITE TENA
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

DAVID TURNER
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

PATRICK VELEKEI
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

KAREN WANG M.D.
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

KIM WOERLE
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR

NAME AND ADDRESS

TITLE

RICHARD EHST
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR THROUGH MARCH

NAME AND ADDRESS

TITLE

DAVID CAPITANO
25 N. 2ND STREET, SUITE 101
READING, PA 19601

DIRECTOR THROUGH MAY

NAME AND ADDRESS

SUE AND CRAIG PERROTY
25 N. 2ND STREET, SUITE 101 READING, PA 19601

BUSINESS

SPOUSES