## ** PUBLIC DISCLOSURE COPY **

## гот 990 <br> Department of the Treasury Internal Revenue Service

 Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)\author{

- Do not enter social security numbers on this form as it may be made public. <br> $>$ Information about Form 990 and its instructions is at www.irs. gov/form990
}

2014
Open to Public Inspection A For the 2014 calendar year, or tax year beginning JUL 1, 2014 and ending JUN 30, 2015


Part I Summary

| Activities \& Governance |  | 1 Briefly describe the organization's mission or most significant activities: Transf helping people in need build better lives. |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |
|  |  | 2 Check this box $\square$ if the organization discontinued its operations or disposed of more than $25 \%$ of its net assets. |  |  |
|  |  | Number of voting members of the governing body (Part VI, line 1a) | 3 | 18 |
|  |  | 4 Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 18 |
|  |  | Total number of individuals employed in calendar year 2014 (Part V, line 2a) | 5 | 636 |
|  |  | 6 Total number of volunteers (estimate if necessary) | 6 | 125 |
|  |  | 7 a Total unrelated business revenue from Part VIII, column (C), line 12b Net unrelated business taxable income from Form 990-T, line $34 \ldots$ | 7 a | 31,689. |
|  |  | 7b | 0 - |
|  |  |  | b Net unrelated business taxable income from Form 990-T, line 34 | Prior Year | Current Year |
|  |  | 8 Contributions and grants (Part VIII, line 1h) | 16,673,837. | 16,144,139. |
|  | E |  | 10,989,952. | 11,304,404. |
|  | $\stackrel{\sim}{0}$ | 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 260,536. | 17,415. |
|  |  | 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) ............ | -12,430. | 72,901. |
|  |  |  | 27,911,895. | 27,538,859. |
|  |  | 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) | 0 . | 0 - |
|  |  | 14 Benefits paid to or for members (Part IX, column (A), line 4) ... | 0. | 0 |
|  |  | 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <br> 16a Professional fundraising fees (Part IX, column (A), line 11e) | 19,658,145. | 19,193,159. |
|  | $\stackrel{0}{0}$ |  | 0 . | 0 - |
|  | 浐 | 16a Professional fundraising fees (Part IX, column (A), line 11e) <br> b Total fundraising expenses (Part IX, column (D), line 25) $\quad$ 292, 839. |  | 7,769,081. |
|  |  | 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) ............ | 7,966,841. |  |
|  |  | 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | 27,624,986. | 26,962,240. |
|  |  | 19 Revenue less expenses. Subtract line 18 from line 12 | 286,909. | 576,619. |
|  | O | 20 Total assets (Part X, line 16) | Beginning of Current Year | End of Year |
|  | 気 |  | 17,376,923. | 17,037,793. |
|  | 2 | 21 Total liabilities (Part X, line 26)22 Net assets or fund balances. Subtract line................... 21 from line 20 | 12,911,167. | 12,019,069. |
|  | - |  | 4,465,756. | 5,018,724. |

## 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.


## Form 990 (2014)

The Opportunity Alliance

1 Briefly describe the organization's mission:
Transforming our community by helping people in need build better lives.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?
$\square$ Yes X No
If "Yes," describe these new services on Schedule O.
3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?................. $\square$ Yes $\quad \mathrm{X}$ No If "Yes," describe these changes on Schedule O.
4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501 (c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.


Service Area 1: Children and Family Services and Supports

> This area includes all of our early childhood development programming, our home visiting programming for expectant parents and the parents of toddlers, and our nutrition programming.

-Early Head Start: a free family visiting program for qualifying families. "Parent Partners" make weekly home visits to pregnant mothers, and children age $0-3$ and their families.
-Head Start: a program that provides all children with a safe nurturing environment while supporting parents while they identify and meet their
4b (Code: ) (Expenses $\$ 12,393,654$. including grants of $\$ \ldots$ (Revenue $\$ \frac{6,283,197 .}{}$

Service Area 2: Mental Health and Co-occurring Mental Health and Substance Use Disorder Treatment

This area includes our adult mental health services, our children and youth mental health services, our residential treatment programming, and our crisis services.

Children \& Youth Mental Health Services:
-Children's Case Management: Case managers help to coordinate and advocate for needed mental health, educational, legal, financial and supportive services for children and youth ages birth to 21 years.


Service Area 3: Family and Community Supports

| -Parenting Education: provides individual coaching for parents, |
| :--- |
| Conducts trainings for parents and educators, and supports a variety of |
| initiatives to improve parenting. | initiatives to improve parenting.

-Parents as Partners: Parents who have navigated the state's child protective system successfully reunifying with their children, act as advocates and provide support to parents currently engaged in the system and attempting to reunify with their children.
-Parent Coaching: Parent Coaches work with parents to customize a
4d Other program services (Describe in Schedule 0 .)


432002 See Schedule 0 for Continuation(s) 2

1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A
2 Is the organization required to complete Schedule B, Schedule of Contributors?
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes, " complete Schedule C, Part I
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes, " complete Schedule C, Part II
5 Is the organization a section 501 (c)(4), 501(c)(5), or 501 (c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes, " complete Schedule C, Part III
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes, " complete Schedule D, Part I
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II.
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes, " complete Schedule D, Part III
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes, " complete Schedule D, Part IV
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes, " complete Schedule D, Part V
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.
a Did the organization report an amount for land, buildings, and equipment in Part X , line 10? If "Yes, " complete Schedule D, Part VI
b Did the organization report an amount for investments - other securities in Part X, line 12 that is $5 \%$ or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII
c Did the organization report an amount for investments - program related in Part X, line 13 that is $5 \%$ or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII
d Did the organization report an amount for other assets in Part X, line 15 that is $5 \%$ or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes, " complete Schedule D, Part X
$f$ Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes, " complete Schedule D, Part X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes, " complete Schedule D, Parts XI and XII
b Was the organization included in consolidated, independent audited financial statements for the tax year?
If "Yes, " and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional
13 Is the organization a school described in section 170(b)(1)(A)(i)? If "Yes," complete Schedule E
14a Did the organization maintain an office, employees, or agents outside of the United States?
b Did the organization have aggregate revenues or expenses of more than $\$ 10,000$ from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $\$ 100,000$ or more? If "Yes, " complete Schedule F, Parts I and IV
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes, " complete Schedule F, Parts II and IV
16 Did the organization report on Part IX, column (A), line 3, more than $\$ 5,000$ of aggregate grants or other assistance to or for foreign individuals? If "Yes, " complete Schedule F, Parts III and IV
17 Did the organization report a total of more than $\$ 15,000$ of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes, " complete Schedule G, Part I
18 Did the organization report more than $\$ 15,000$ total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes, " complete Schedule G, Part II
19 Did the organization report more than $\$ 15,000$ of gross income from gaming activities on Part VIII, line 9a? If "Yes, " complete Schedule G, Part III
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?

|  | Yes | No |
| :---: | :---: | :---: |
| 1 | X |  |
| 2 | X |  |
| 3 |  | X |
| 4 | X |  |
| 5 |  | X |
| 6 |  | X |
| 7 |  | X |
| 8 |  | X |
| 9 |  | x |
| 10 |  | X |
| 11a | X |  |
| 11b |  | X |
| 11c |  | X |
| 11d |  | X |
| 11e | X |  |
| 11f |  | X |
| 12a |  | X |
| 12b | x |  |
| 13 |  | X |
| 14a |  | X |
| 14b |  | X |
| 15 |  | X |
| 16 |  | x |
| 17 |  | x |
| 18 | x |  |
| 19 |  | X |
| 20a |  | X |
| 20b |  |  |

21 Did the organization report more than $\$ 5,000$ of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes, " complete Schedule I, Parts I and II
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes, " complete Schedule I, Parts I and III

23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes, " complete Schedule J
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $\$ 100,000$ as of the last day of the year, that was issued after December 31, 2002? If "Yes, " answer lines $24 b$ through $24 d$ and complete Schedule K. If "No", go to line 25a
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes, " complete Schedule L, Part I
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes, " complete Schedule L, Part I
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a $35 \%$ controlled entity or family member of any of these persons? If "Yes, " complete Schedule L, Part III
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):
a A current or former officer, director, trustee, or key employee? If "Yes, " complete Schedule L, Part IV
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes, " complete Schedule L, Part IV
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes, " complete Schedule M
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes, " complete Schedule M
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes, " complete Schedule N, Part I
32 Did the organization sell, exchange, dispose of, or transfer more than $25 \%$ of its net assets?If "Yes, " complete Schedule N, Part II
33 Did the organization own 100\% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes, " complete Schedule R, Part I
34 Was the organization related to any tax-exempt or taxable entity? If "Yes, " complete Schedule R, Part II, III, or IV, and Part V, line 1
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes, " complete Schedule R, Part V, line 2
36 Section $\mathbf{5 0 1 ( c ) ( 3 )}$ organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes, " complete Schedule R, Part V, line 2
37 Did the organization conduct more than $5 \%$ of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes, " complete Schedule R, Part VI
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O

|  | Yes | No |
| :---: | :---: | :---: |
| 21 |  | X |
| 22 |  | X |
| 23 | X |  |
| 24a | X |  |
| 24b |  | X |
| 24c |  | X |
| 24d |  | X |
| 25a |  | X |
| 25b |  | X |
| 26 |  | X |
| 27 |  | X |
| 28a |  | X |
| 28b |  | X |
| 28c |  | X |
| 29 |  | X |
| 30 |  | X |
| 31 |  | X |
| 32 |  | X |
| 33 |  | X |
| 34 | X |  |
| 35a | X |  |
| 35b | X |  |
| 36 |  | X |
| 37 |  | X |
| 38 | X |  |

1a Enter the number reported in Box 3 of Form 1096. Enter -0-if not applicable

b Enter the number of Forms W-2G included in line 1a. Enter -0 - if not applicable | $1 a$ |
| :--- |
| $1 b$ |

c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return
b If at least one is reported on line 2 a , did the organization file all required federal employment tax returns?
Note. If the sum of lines $1 a$ and $2 a$ is greater than 250 , you may be required to e-file (see instructions)
3a Did the organization have unrelated business gross income of $\$ 1,000$ or more during the year?
b If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule $O$
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?
b If "Yes," enter the name of the foreign country:
See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?
c If "Yes," to line 5 a or 5 b, did the organization file Form 8886-T?
6a Does the organization have annual gross receipts that are normally greater than $\$ 100,000$, and did the organization solicit any contributions that were not tax deductible as charitable contributions?
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?
7 Organizations that may receive deductible contributions under section 170(c).
a Did the organization receive a payment in excess of $\$ 75$ made partly as a contribution and partly for goods and services provided to the payor?
b If "Yes," did the organization notify the donor of the value of the goods or services provided?
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?
d If "Yes," indicate the number of Forms 8282 filed during the year

e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?
9 Sponsoring organizations maintaining donor advised funds.
a Did the sponsoring organization make any taxable distributions under section 4966?
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?
10 Section 501(c)(7) organizations. Enter:
a Initiation fees and capital contributions included on Part VIII, line 12
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities


11 Section 501(c)(12) organizations. Enter:
a Gross income from members or shareholders
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041 ?
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year
13 Section 501(c)(29) qualified nonprofit health insurance issuers.
a Is the organization licensed to issue qualified health plans in more than one state?
Note. See the instructions for additional information the organization must report on Schedule O.
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans
c Enter the amount of reserves on hand
14a Did the organization receive any payments for indoor tanning services during the tax year?
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O

| $11 a$ |  |
| :---: | :--- |
| $11 b$ |  |

## Section A. Governing Body and Management

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 in Schedule 0.
b Enter the number of voting members included in line 1a, above, who are independent
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?
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?
5 Did the organization become aware during the year of a significant diversion of the organization's assets?
6 Did the organization have members or stockholders?
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:
a The governing body?
b Each committee with authority to act on behalf of the governing body?
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes, " provide the names and addresses in Schedule O

|  |  |  | Yes | No |
| :---: | :---: | :---: | :---: | :---: |
| 1a | 18 |  |  |  |
| 1b | 18 |  |  |  |
| hip with |  |  |  |  |
|  |  | 2 |  | X |
| the direct |  |  |  |  |
|  |  | 3 |  | X |
| 990 w |  | 4 |  | X |
| ssets? |  | 5 |  | X |
|  |  | 6 |  | X |
| appoint |  |  |  |  |
|  |  | 7a |  | X |
| stockh |  |  |  |  |
|  |  | 7b |  | X |
| ear by th |  |  |  |  |
|  |  | 8a | X |  |
|  |  | 8b | X |  |
| eached |  | 9 |  | X |

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)
10a Did the organization have local chapters, branches, or affiliates?
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?
b Describe in 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
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done
13 Did the organization have a written whistleblower policy?
14 Did the organization have a written document retention and destruction policy?
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?
a The organization's CEO, Executive Director, or top management official
b Other officers or key employees of the organization
If "Yes" to line 15a or 15b, describe the process in 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?
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?

|  | Yes | No |
| :---: | :---: | :---: |
| $10 a$ |  | $X$ |
| $10 b$ |  |  |
| $11 a$ | $X$ |  |
| $12 a$ | $X$ |  |
| $12 b$ | $X$ |  |
| $12 c$ | $X$ |  |
| 13 | $X$ |  |
| 14 | $X$ |  |
|  |  |  |
| $15 a$ | $X$ |  |
| $15 b$ |  | $X$ |
|  |  |  |
| $16 a$ |  | $X$ |
|  |  |  |
| $16 b$ |  |  |

## Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed None
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
X Own website
Another's website
X Upon request $\qquad$ Other (explain in Schedule O)

19 Describe in Schedule $O$ whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records:
Dawn Ouellette - (207) 523-5021
50 Monument Square, Portland, ME 04101

## 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 -O- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's current key employees, if any. See 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 and/or Box 7 of Form 1099-MISC) 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.
List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.
$\square$ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| (A) <br> Name and Title | (B) <br> Average <br> hours per <br> week <br> (list any <br> hours for <br> related <br> organizations <br> below <br> line) | (C) Position(do not check more than onebox, unless person is both an box, unless person is both anofficer and a director/trustee) |  |  |  |  |  | (D)Reportablecompensationfromtheorganization(W-2/1099-MISC) | (E)Reportablecompensationfrom relatedorganizations(W-2/1099-MISC) | (F)Estimatedamount ofothercompensationfrom theorganizationand reatedorganizations |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | - |  |  |  | 宮 |  |  |  |
| (1) Thomas W. Saturley | 2.00 |  |  |  |  |  |  |  |  |  |
| Chair |  | X |  | X |  |  |  | 0. | 0. | 0. |
| (2) Dan Hunter | 1.50 |  |  |  |  |  |  |  |  |  |
| Treasurer |  | X |  | X |  |  |  | 0. | 0. | 0 . |
| (3) Marc Doyon | 3.00 |  |  |  |  |  |  |  |  |  |
| Secretary |  | X |  | X |  |  |  | 0. | 0. | 0. |
| (4) Angus King, III | 2.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0. |
| (5) Anita Chandler | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0. |
| (6) Barbara T. Schneider | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (7) Chris Jerome | 2.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0. |
| (8) Colette Twigg-Rowse | 2.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (9) Gerald Vicenzi | 2.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (10) Greg Shinberg | 0.50 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (11) Jane Harmon | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (12) Jim Vachon | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (13) Peter Harrison | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (14) Tim Soley | 3.00 |  |  |  |  |  |  |  |  |  |
| Trustee | 1.00 | X |  |  |  |  |  | 0. | 0. | 0 . |
| (15) Tom Smith | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (16) Cynthia Tayman-veroneau | 1.00 |  |  |  |  |  |  |  |  |  |
| Trustee |  | X |  |  |  |  |  | 0. | 0. | 0 . |
| (17) Rebecca Bloch, MD Trustee | 2.00 | X |  |  |  |  |  | 0. | 0. | 0. |
|  |  |  |  |  |  |  |  |  |  | 90 |


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



## 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) <br> Name and business address | (B) <br> Description of services | (C) <br> Compensation |
| :---: | :---: | :---: |
| Interpret Maine |  |  |
| PO Box 3535, Portland, ME 04104 | Interpreting | 114,236. |
| J. Irving \& Sons |  |  |
| 174 Corn Shop Road, Fryeburg, ME 04037 | Heating Contractor | 112,365. |
|  |  |  |
|  |  |  |
|  |  |  |
| 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 2 |  |  |
|  |  | Form 990 (2014) |

## Part VIII Statement of Revenue



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) | $\begin{gathered} \text { (B) } \\ \begin{array}{c} \text { Program service } \\ \text { expenses } \end{array} \\ \hline \end{gathered}$ | (C) general expenses | $\begin{gathered} \text { Fundraising } \\ \text { expenses } \end{gathered}$ |
|  |  |  |  |  |
| 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 $\qquad$ |  |  |  |  |
| 4 Benefits paid to or for members ................... |  |  |  |  |
|  |  |  |  |  |
| 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 | 14,727,617. | 13,075,168. | 1,475,085. | 177,364. |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | 188,301. | 177,615. | 5,771. | 4,915. |
| Other employee benefits | 2,460,058. | 2,208,820. | 229,926. | 21,312. |
| 10 Payroll taxes | 1,332,549. | 1,166,580. | 150,326. | 15,643. |
| 11 Fees for services (non-employees):a Management |  |  |  |  |
| b Legal | 40,839. | 1,109. | 39,730. |  |
|  |  |  |  |  |
| d Lobbying |  |  |  |  |
|  |  |  |  |  |
| f Investment management fees |  |  |  |  |
| g Other. (If line 11 g amount exceeds $10 \%$ of line 25 , column (A) amount, list line 11 g expenses on Sch 0 .) | 1,226,415. | 1,079,022. | 116,828. | 30,565. |
| 12 Advertising and promotion ...... | 21,025. | 16,443. | 4,582. |  |
| 13 Office expenses. | 909,676. | 739,273. | 131,438. | 38,965. |
| 14 Information technology |  |  |  |  |
| 15 Royalties |  |  |  |  |
| 16 Occupancy | 1,769,007. | 1,750,624. | 12,879. | 5,504. |
| 17 Travel | 424,989. | 401,927. | 22,645. | 417. |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials |  |  |  |  |
| 19 Conferences, conventions, and meetings ...... | 237,759. | 117,247. | 118,961. | 1,551. |
| 20 Interest |  |  |  |  |
| 21 Payments to affiliates |  |  |  |  |
| 22 Depreciation, depletion, and amortization | 734,001. | 721,723. | 12,278. |  |
| 23 Insurance | 221,711. | 209,626. | 11,088. | 997. |
| 24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24 amount exceeds $10 \%$ of line 25 , column (A) amount, list line 24 e expenses on Schedule 0 .) |  |  |  |  |
| a Client Expenses | 1,268,500. | 1,264,158. | 32. | 4,310. |
| PNMI Tax | 314,629. | 314,629. | 0. | 0. |
| c Miscellaneous | 120,218. | 80,845. | 48,326. | -8,953. |
| Payroll Processing Fee | 33,089. | 30,049. | 2,791. | 249. |
| e All other expenses |  |  |  |  |
| 25 Total functional expenses. Add lines 1 through 24e | 26,962,240. | 23,693,498. | 2,975,903. | 292,839. |
| 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 $\square$ if following SOP 98-2 (ASC 958-720) |  |  |  |  |

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


## 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)
2 Total expenses (must equal Part IX, column (A), line 25)
3 Revenue less expenses. Subtract line 2 from line 1
4 Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))
5 Net unrealized gains (losses) on investments
6 Donated services and use of facilities
7 Investment expenses
8 Prior period adjustments
9 Other changes in net assets or fund balances (explain in Schedule O)
10 Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))

|  |  |
| ---: | ---: |
| 1 | $27,538,859$. |
| 2 | $26,962,240$. |
| 3 | $576,619$. |
| 4 | $4,465,756$. |
| 5 | $-23,651$. |
| 6 |  |
| 7 |  |
| 8 | 0 |
| 9 |  |
| 10 | $5,018,724$. |

Part XII Financial Statements and Reporting
Check if Schedule O contains a response or note to any line in this Part XII
1 Accounting method used to prepare the Form 990: $\square$ Cash $\quad \mathrm{X}$ Accrual $\square$ Other If the organization changed its method of accounting from a prior year or checked "Other," explain in 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:Separate basis $\qquad$ Consolidated basis $\square$ Both consolidated and separate basis
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:Separate basis X Consolidated basis $\square$ Both consolidated and separate basis
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits


## The Opportunity Alliance

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)
$1 \square$ A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
$2 \square$ A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)
$3 \quad$ A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
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: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.)
$6 \quad$ A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
7 X 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.)
$8 \quad$ A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)
$9 \square$ An organization that normally receives: (1) more than $331 / 3 \%$ 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 $331 / 3 \%$ 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.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4).
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 in lines 11a through 11d that describes the type of supporting organization and complete lines $11 \mathrm{e}, 11 \mathrm{f}$, and 11 g .
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
b organization. You must complete Part IV, Sections A and 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
c organization(s). You must complete Part IV, Sections A and 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 \(1-9\) above or IRC section (see instructions))``` | $\|$(iv) Is the organization <br> listed in your <br> governing document? |  | (v) Amount of monetary support (see Instructions) | (vi) Amount of other support (see Instructions) |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | Yes | No |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |

(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.)


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

(Complete only if you checked the box on line 9 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.)

| Calendar year (or fiscal year beginning in) | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") |  |  |  |  |  |  |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose |  |  |  |  |  |  |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513 |  |  |  |  |  |  |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf |  |  |  |  |  |  |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge |  |  |  |  |  |  |
| 6 Total. Add lines 1 through 5 |  |  |  |  |  |  |
| 7a Amounts included on lines 1,2, and 3 received from disqualified persons |  |  |  |  |  |  |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $\$ 5,000$ or $1 \%$ of the amount on line 13 for the year |  |  |  |  |  |  |
| c Add lines 7a and 7b |  |  |  |  |  |  |
| 8 Public support (Subtract line 7 c from line 6.) |  |  |  |  |  |  |
| Section B. Total Support |  |  |  |  |  |  |
| Calendar year (or fiscal year beginning in) | (a) 2010 | (b) 2011 | (c) 2012 | (d) 2013 | (e) 2014 | (f) Total |
| 9 Amounts from line 6. |  |  |  |  |  |  |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources |  |  |  |  |  |  |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 |  |  |  |  |  |  |
| c Add lines 10a and 10b |  |  |  |  |  |  |
| 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on |  |  |  |  |  |  |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) |  |  |  |  |  |  |
| 13 Total support. (Add lines 9, 10c, 11, and 12.) |  |  |  |  |  |  |

14 First five 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



## Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f))
18 Investment income percentage from 2013 Schedule A, Part III, line 17

| 17 | $\%$ |
| ---: | ---: |
| 18 | $\%$ |

19a $331 / 3 \%$ support tests - 2014. If the organization did not check the box on line 14 , and line 15 is more than $331 / 3 \%$, and line 17 is not more than $331 / 3 \%$, check this box and stop here. The organization qualifies as a publicly supported organization
b 33 1/3\% support tests - 2013. If the organization did not check a box on line 14 or line 19a, and line 16 is more than $331 / 3 \%$, and line 18 is not more than $331 / 3 \%$, 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
(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and $B$. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete
Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

## Section A. All Supporting Organizations

1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No" describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes, " explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes, " answer (b) and (c) below.
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes, " describe in Part VI when and how the organization made the determination.
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2) (B) purposes? If "Yes, " explain in Part VI what controls the organization put in place to ensure such use.

4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes, " explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) 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).
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 (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes, " provide detail in
Part VI.
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes, " complete Part I of Schedule L (Form 990).
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes, " complete Part I of Schedule L (Form 990).
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes, " provide detail in Part VI.
b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes, " provide detail in Part VI.
c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes, " provide detail in Part VI.
10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes, " answer (b) below.
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

|  | Yes | No |
| :---: | :---: | :---: |
|  |  |  |
| 1 |  |  |
|  |  |  |
| 2 |  |  |
|  |  |  |
| 3a |  |  |
|  |  |  |
| 3b |  |  |
|  |  |  |
| 3c |  |  |
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| 4a |  |  |
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| 4b |  |  |
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| 4c |  |  |
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| 5a |  |  |
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| 5b |  |  |
| 5c |  |  |
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| 7 |  |  |
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| 8 |  |  |
|  |  |  |
| 9a |  |  |
|  |  |  |
| 9b |  |  |
|  |  |  |
| 9c |  |  |
|  |  |  |
| 10a |  |  |
|  |  |  |
| 10b |  |  |

11 Has the organization accepted a gift or contribution from any of the following persons?
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?
b A family member of a person described in (a) above?
c A $35 \%$ controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part Vl.


## Section B. Type I Supporting Organizations

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


## Section C. Type II Supporting Organizations

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


## Section D. Type III Supporting Organizations

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


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

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year(see instructions):
a $\square$ The organization satisfied the Activities Test. Complete line 2 below.
b $\quad$ The organization is the parent of each of its supported organizations. Complete line 3 below.
c $\square$ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).
2 Activities Test. Answer (a) and (b) below.
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes, " then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes, " explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.
3 Parent of Supported Organizations. Answer (a) and (b) below.
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part v/ the role played by the organization in this regard.

| 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 | 1 a |  |  |
| 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 (explain in detail in Part VI): |  |  |  |
| 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 1-1/2\% 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 . 035 | 6 |  |  |
| 7 Recoveries of prior-year distributions | 7 |  |  |
| 8 Minimum Asset Amount (add line 7 to line 6) | 8 |  |  |
| Section C-Distributable Amount |  |  | Current Year |
| 1 Adjusted net income for prior year (from Section A, line 8, Column A) | 1 |  |  |
| 2 Enter 85\% of line 1 | 2 |  |  |
| 3 Minimum asset amount for prior year (from Section B, line 8, Column A) | 3 |  |  |
| 4 Enter greater of line 2 or line 3 | 4 |  |  |
| 5 Income tax imposed in prior year | 5 |  |  |
| 6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) | 6 |  |  |

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

| Section D - Distributions |  |  | Current Year |
| :---: | :---: | :---: | :---: |
| 1 Amounts paid to supported organizations to accomplish exeremer | pt purposes |  |  |
| 2 Amounts paid to perform activity that directly furthers exe organizations, in excess of income from activity | purposes of supported |  |  |
| 3 Administrative expenses paid to accomplish exempt purp | of supported organizat |  |  |
| 4 Amounts paid to acquire exempt-use assets |  |  |  |
| 5 Qualified set-aside amounts (prior IRS approval required) |  |  |  |
| 6 Other distributions (describe in Part VI). See instructions. |  |  |  |
| 7 Total annual distributions. Add lines 1 through 6. |  |  |  |
| 8 Distributions to attentive supported organizations to which (provide details in Part VI). See instructions. | organization is respon |  |  |
| 9 Distributable amount for 2014 from Section C, line 6 |  |  |  |
| 10 Line 8 amount divided by Line 9 amount |  |  |  |
| Section E-Distribution Allocations (see instructions) | (i) <br> Excess Distributions | (ii) <br> Underdistributions Pre-2014 | (iii) <br> Distributable Amount for 2014 |
| 1 Distributable amount for 2014 from Section C, line 6 |  |  |  |
| 2 Underdistributions, if any, for years prior to 2014 (reasonable cause required-see instructions) |  |  |  |
| 3 Excess distributions carryover, if any, to 2014: |  |  |  |
| a |  |  |  |
| b |  |  |  |
| c |  |  |  |
| d |  |  |  |
| e From 2013 |  |  |  |
| Total of lines 3a through e |  |  |  |
| g Applied to underdistributions of prior years |  |  |  |
| h Applied to 2014 distributable amount |  |  |  |
| Carryover from 2009 not applied (see instructions) |  |  |  |
| j Remainder. Subtract lines 3g, 3h, and 3i from 3f. |  |  |  |
| 4 Distributions for 2014 from Section D, line 7 : |  |  |  |
| a Applied to underdistributions of prior years |  |  |  |
| b Applied to 2014 distributable amount |  |  |  |
| c Remainder. Subtract lines 4a and 4b from 4. |  |  |  |
| 5 Remaining underdistributions for years prior to 2014, if any. Subtract lines 3 g and 4 a from line 2 (if amount greater than zero, see instructions). |  |  |  |
| 6 Remaining underdistributions for 2014. Subtract lines 3 h and 4b from line 1 (if amount greater than zero, see instructions). |  |  |  |
| 7 Excess distributions carryover to 2015. Add lines 3 j and 4 c . |  |  |  |
| 8 Breakdown of line 7: |  |  |  |
| a |  |  |  |
| b |  |  |  |
| c |  |  |  |
| d Excess from 2013 |  |  |  |
| e Excess from 2014 |  |  |  |

Schedule A (Form 990 or 990-EZ) 2014 The Opportunity Alliance
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Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

## - Attach to Form 990, Form 990-EZ, or Form 990-PF.

 or 990-PF)
## Information about Schedule B (Form 990, 990-EZ, or 990-PF) and

 its instructions is at www.irs.gov/form990.
## Name of the organization

Organization type(check one):

| Filers of: | Section: |
| :---: | :---: |
| Form 990 or 990-EZ | X 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 |
|  | $\square$ 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

X For an organization described in section 501 (c)(3) filing Form 990 or $990-E Z$ that met the $331 / 3 \%$ support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), 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 1 h , 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 $990-E Z$ that received from any one contributor, during the year, total contributions of more than $\$ 1,000$ exc/usively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, 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. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexc/usively religious, charitable, etc., contributions totaling \$5,000 or more during the year $\qquad$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), 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 does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

[^0]| Name of organization | Employer identification number |
| :--- | :---: |
| The Opportunity Alliance | $01-0274725$ |

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) <br> No. | (b) <br> 1 |  | (c) <br> Total contributions |
| ---: | :---: | :---: | :---: |
| Name, address, and ZIP + 4 |  |  |  |

The Opportunity Alliance
Part II Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No. from <br> Part | (b) <br> Description of noncash property given |  | (c) <br> FMV (or estimate) (see instructions) | (d) <br> Date received |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | - |  |
| (a) No. from Part I | (b) <br> Description of noncash property given |  | (c) FMV (or estimate) (see instructions) | (d) <br> Date received |
|  |  |  | - |  |
| (a) <br> No. <br> from <br> Part I | (b) <br> Description of noncash property given |  | (c) FMV (or estimate) (see instructions) | (d) <br> Date received |
|  |  |  | - |  |
| (a) <br> No. <br> from <br> Part I | (b) <br> Description of noncash property given |  | (c) FMV (or estimate) (see instructions) | (d) Date received |
|  |  |  | $\square$ |  |
| (a) <br> No. <br> from <br> Part I | (b) <br> Description of noncash property given |  | (c) <br> FMV (or estimate) (see instructions) | (d) <br> Date received |
|  |  | — | - |  |
| (a) <br> No. <br> from <br> Part I | (b) <br> Description of noncash property given |  | (c) <br> FMV (or estimate) (see instructions) | (d) <br> Date received |
|  |  | E | \$ |  |
| 423453 11-05-14 |  | Schedule B (Form 990, $\overline{\text { 990-EZ, or 990-PF) (2014) }}$ |  |  |
| 231113 | 757052 110177.AB-10 2014.04030 The | Oppo | ortunity Alli | 110177 |

The Opportunity Alliance
Part III Exclusively religious, charitable, etc., contributions to organizations described in section $501(\mathrm{c})(7)$, $(8)$, or (10) that total more than $\$ 1,000$ tor
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.

(e) Transfer of gift

(e) Transfer of gift

(e) Transfer of gift


SCHEDULE C
(Form 990 or 990-EZ)

## Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527 Complete if the organization is described below. Attach to Form 990 or Form 990-EZ. Information about Schedule C (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.


Department of the Treasury Internal Revenue Service

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501 (c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501 (c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501 (c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.


## Name of organization

## The Opportunity Alliance

## Part I-A $\quad$ Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
2 Political expenditures $>\$$
3 Volunteer hours

\section*{| Part I-B | Complete if the organization is exempt under section 501(c)(3). |
| :--- | :--- |}


b If "Yes," describe in Part IV.


5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from <br> filing organization's <br> funds. If none, enter -0-. <br> (e) Amount of political <br> contributions received and <br> promptly and directly <br> delivered to separate <br> political organization. <br> If none, enter -0.. |  |
| :--- | :--- | :--- | :--- | :--- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

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| if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures). <br> if the filing organization checked box A and "limited control" provisions apply. |  |  |  |
| :---: | :---: | :---: | :---: |
| Limits on Lobbying Expenditures <br> (The term "expenditures" means amounts paid or incurred.) |  | (a) Filing organization's totals | (b) Affiliated group totals |
| 1a Total lobbying expenditures to influence pub <br> b Total lobbying expenditures to influence a le <br> c Total lobbying expenditures (add lines 1a an <br> d Other exempt purpose expenditures <br> e Total exempt purpose expenditures (add lines <br> f Lobbying nontaxable amount. Enter the amo | opinion (grass roots lobbying) <br> lative body (direct lobbying) <br> b) <br> c and 1d) <br> $t$ from the following table in both columns. <br> The lobbying nontaxable amount is: <br> $20 \%$ of the amount on line 1 e . <br> $\$ 100,000$ plus $15 \%$ of the excess over $\$ 500,000$. <br> $\$ 175,000$ plus $10 \%$ of the excess over $\$ 1,000,000$ <br> $\$ 225,000$ plus $5 \%$ of the excess over $\$ 1,500,000$. <br> $\$ 1,000,000$. |  |  |
| g Grassroots nontaxable amount (enter 25\% <br> h Subtract line 1 g from line 1 a . If zero or less, <br> i Subtract line 1 f from line 1c. If zero or less, <br> j If there is an amount other than zero on eith reporting section 4911 tax for this year? | ne 1f) <br> er -0 - <br> - 0 - <br> ne 1 h or line 1i, did the organization file Form 4720 |  | Yes $\quad \square$ No |

4-Year Averaging Period Under section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)
Lobbying Expenditures During 4-Year Averaging Period

| Lobbying Expenditures During 4-Year Averaging Period |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Calendar year (or fiscal year beginning in) | (a) 2011 | (b) 2012 | (c) 2013 | (d) 2014 | (e) Total |
| 2a Lobbying nontaxable amount |  |  |  |  |  |
| b Lobbying ceiling amount (150\% of line 2a, column(e)) |  |  |  |  |  |
| c Total lobbying expenditures |  |  |  |  |  |
| d Grassroots nontaxable amount |  |  |  |  |  |
| e Grassroots ceiling amount (150\% of line 2d, column (e)) |  |  |  |  |  |
| f Grassroots lobbying expenditures |  |  |  |  |  |



Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.
Part II-B, Line 1, Lobbying Activities:
The organization pays dues to associations of which a portion is
attributable to lobbying activities.

## Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.Complete if the

 organization answered "Yes" to Form 990, Part IV, line 6.1 Total number at end of year
2 Aggregate value of contributions to (during year)
3 Aggregate value of grants from (during year)
4 Aggregate value at end of year

|  | (a) Donor advised funds |
| :---: | :---: |
|  |  |
| year) |  |
|  |  |
|  |  |

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?
(b) Funds and other accounts

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?
Part II
1 Purpose(s) of conservation easements held by the organization (check all that apply).


Preservation of land for public use (e.g., recreation or education)Preservation of a historically important land area
Protection of natural habitat
Preservation of a certified historic structure
Preservation of open space
2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.
a Total number of conservation easements
b Total acreage restricted by conservation easements
c Number of conservation easements on a certified historic structure included in (a)
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register

|  | Held at the End of the Tax Year |
| :--- | :--- |
| 2a |  |
| 2b |  |
| 2c |  |
| $2 d$ |  |
| $2 d$ |  |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year
4 Number of states where property subject to conservation easement is located
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? $\qquad$ .......................... $\square$ Yes
6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year
7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year $\$$


8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?


9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

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

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.
b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

```
(i) Revenue included in Form 990, Part VIII, line 1 _...........................................................................
```



2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

b Assets included in Form 990, Part X ................................................................................................... D \$

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):


Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to 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?
b If "Yes," explain the arrangement in Part XIII and complete the following table:
c Beginning balance
d Additions during the year
e Distributions during the year
f Ending balance

|  | Amount |
| :---: | :---: |
| 1c |  |
| 1d |  |
| 1e |  |
| 1f |  |

2a Did the organization include an amount on Form 990, Part $X$, line 21, for escrow or custodial account liability? $\qquad$ 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" to Form 990, Part IV, line 10. |
| :--- | :--- | :--- |

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

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
a Board designated or quasi-endowment $\qquad$ \%
b Permanent endowment $\qquad$ \%
c Temporarily restricted endowment $\qquad$ \%
The percentages in 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:
(i) unrelated organizations
(ii) related organizations
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?


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" to 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 |  | 1,204,955. |  | 1,204,955. |
| b Buildings |  | 16,912,872. | 6,102,767. | 10,810,105. |
| c Leasehold improvements |  |  |  |  |
| d Equipment |  | 2,271,222. | 1,830,983. | 440,239. |
| e Other |  |  |  |  |
| Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) |  |  | - | 12,455,299. |

Complete if the organization answered "Yes" to 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, col. (B) line 12.) |  |  |

Part VIII Investments - Program Related.
Complete if the organization answered "Yes" to 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, col. (B) line 13.) |  |  |
| Part IX Other |  |  |

## Part IX Other Assets.

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

| (a) Description | (b) Book value |
| :--- | :---: |
| $(1)$ |  |
| $(2)$ |  |
| $(3)$ |  |
| $(4)$ |  |
| $(5)$ |  |
| $(6)$ |  |
| $(7)$ |  |
| $(8)$ |  |
| $(9)$ |  |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) $\ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots \ldots$ |  |

Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)

## Part X Other Liabilities.

Complete if the organization answered "Yes" to 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 |  |
| $(2)$ Security Deposits | $21,974$. |
| $(3)$ Third Party Settlements | $553,668$. |
| $(4)$ Due to State of Maine | $61,960$. |
| $(5)$ Interest Rate Swap | $1,630$. |
| $(6)$ Due to Affiliates | $27,449$. |
| $(7)$ |  |
| $(8)$ | $666,681$. |
| $(9)$ |  |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) |  |

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

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\section*{| Part XI | Reconciliation of Revenue per Audited Financial Statements With Revenue per Return. |
| :--- | :--- |}

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.
1 Total revenue, gains, and other support per audited financial statements
2 Amounts included on line 1 but not on Form 990, Part VIII, line 12:
a Net unrealized gains (losses) on investments
b Donated services and use of facilities
c Recoveries of prior year grants
d Other (Describe in Part XIII.)
e Add lines 2a through 2d
3 Subtract line 2e from line 1
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
b Other (Describe in Part XIII.)
c Add lines 4a and 4b
5 Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)


| Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return. |
| :--- | :--- |

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.
1 Total expenses and losses per audited financial statements
2 Amounts included on line 1 but not on Form 990, Part IX, line 25:
a Donated services and use of facilities
b Prior year adjustments
c Other losses
d Other (Describe in Part XIII.)
e Add lines 2a through 2d
3 Subtract line 2 e from line 1
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
b Other (Describe in Part XIII.)
c Add lines 4 a and $\mathbf{4 b}$
5 Total expenses. Add lines $\mathbf{3}$ and 4c. (This must equal Form 990, Part I, line 18.)


## 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.

SCHEDULE G
(Form 990 or 990-EZ)

| Department of |
| :--- |
| Internal Reven |
| Name of th |
| Part I |

Supplemental Information Regarding Fundraising or Gaming Activities
Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the

Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form -990.
The Opportunity Alliance required to complete this part.
1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
a $\square$ Mail solicitations
b $\square$ Internet and email solicitations
d $\quad \square$ Phone solicitations
d a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or
key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?
b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be
compensated at least \$5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did have custody or control of contributions? |  | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Yes | No |  |  |  |
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|  |  |  | $>$ |  |  |  |

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form $990-\mathrm{EZ}$, lines 1 and 6 b . List events with gross receipts greater than $\$ 5,000$.

| $\begin{aligned} & \stackrel{\otimes}{\stackrel{\rightharpoonup}{\omega}} \\ & \stackrel{\rightharpoonup}{\omega} \\ & \stackrel{\rightharpoonup}{\otimes} \end{aligned}$ |  | Gross receipts | (a) Event \#1 <br> Golf <br> Tournament <br> (event type) | (b) Event \#2 <br> Sea Dogs Welcome <br> (event type) | (c) Other events $\qquad$ 3 <br> (total number) | (d) Total events (add col. (a) through col. (c)) |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | (event type) | (event type) | (total number) |  |
|  |  |  | 66,518. | 17,391. | 9,854. | 93,763. |
|  |  | Less: Contributions | 66,518. | 17,391. | 9,854. | 93,763. |
|  |  | Gross income (line 1 m |  |  |  |  |
| $\stackrel{\nu}{\overline{0}}$ | 4 Cash prizes |  |  |  |  |  |
|  | 5 | Noncash prizes | 1,813. |  | 1,000. | 2,813. |
|  | 6 |  |  | 713. | 1,000. | 1,713. |
|  | 7 Food and beverages |  |  |  |  |  |
|  | 8 | Entertainment |  |  |  |  |
|  | 9 | Other direct expenses | 16,355. |  | 9,127. | 25,482. |
|  | 10 | Direct expense summa | 9 in column (d) |  | - | 30,008. |
|  | 11 | Net income summary. | line 3, column (d) |  | $\checkmark$ | -30,008. |

Part III Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than
$\$ 15,000$ on Form 990-EZ, line 6a.


9 Enter the state(s) in which the organization conducts gaming activities:
a Is the organization licensed to conduct gaming activities in each of these states? ..................................................... Yes $\square$ No
b If "No," explain: $\qquad$
10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ......................... $\square$.
b If "Yes," explain: b If "Yes," explain:

11 Does the organization conduct gaming activities with nonmembers?
12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?
 No
13 Indicate the percentage of gaming activity conducted in:
a The organization's facility

| 13 a | $\%$ |
| :--- | :--- |
| 13 b | $\%$ |

b An outside facility
13b
14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:


16 Gaming manager information:

Name

Gaming manager compensation $>$ $\qquad$

Description of services provided $\qquad$Employee
Independent contractor

17 Mandatory distributions:
a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? No
b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year $>$ \$
Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information (see instructions).
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# For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees <br> Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990 

Department of the Treasury Internal Revenue Service

\section*{| 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 in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.
 First-class or charter travel Travel for companionsHousing allowance or residence for personal use Tax indemnification and gross-up payments Discretionary spending account Payments for business use of personal residence Health or social club dues or initiation fees Personal services (e.g., maid, chauffeur, chef)
b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked in line 1a?

3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.Compensation committee
Independent compensation consultant
X Form 990 of other organizationsWritten employment contract
X Compensation survey or study
X Approval by the board or compensation committee

4 During the year, did any person listed in 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 in 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" to line 5a or 5b, describe in Part III.
6 For persons listed in 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" to line 6a or 6b, describe in Part III.
7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6 ? If "Yes," describe in Part III
8 Were any amounts reported in 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" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

|  | Yes | No |
| :---: | :---: | :---: |
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| 1b |  |  |
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| 4a |  | X |
| 4b |  | X |
| 4c |  | X |
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| 5a |  | X |
| 5b |  | X |
|  |  |  |
| 6a |  | X |
| 6b |  | X |
|  |  |  |
| 7 |  | X |
|  |  |  |
| 8 |  | X |
| 9 |  |  |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.
Schedule J (Form 990) 2014

Part II
Do not list any individuals that are not 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.


Provide the information, explanation, or descriptions required for Part I, lines $1 \mathrm{a}, 1 \mathrm{~b}, 3,4 \mathrm{a}, 4 \mathrm{~b}, 4 \mathrm{c}, 5 \mathrm{a}, 5 \mathrm{~b}, 6 \mathrm{a}, 6 \mathrm{~b}, 7$, and 8 , and for Part II. Also complete this part for any additional information.
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3a Are there any management or service contracts that may result in private business use of bond-financed property?
? ....................................................................

If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?
c Are there any research agreements that may result in private business use of bond-financed property?
d If "Yes" to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?
4 Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government
5 Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government
6 Total of lines 4 and 5
7 Does the bond issue meet the private security or payment test?
8a Has there been a sale or disposition of any of the bond-financed property to a nongovernmental person other than a 501(c)(3) organization since the bonds were issued?
b If "Yes" to line 8a, enter the percentage of bond-financed property sold or disposed of
c If "Yes" to line 8a, was any remedial action taken pursuant to Regulations sections 1.141-12 and 1.145-2?

9 Has the organization established written procedures to ensure that all nonqualified bonds of the issue are remediated in accordance with the requirements under Regulations sections 1.141-12 and 1.145-2?

|  | A |  | B |  | C |  | D |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Yes | No | Yes | No | Yes | No | Yes | No |
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## Part IV Arbitrage

1 Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate? $\qquad$
2 If "No" to line 1, did the following apply?
a Rebate not due yet?
b Exception to rebate?

| A |  | B |  | C |  | D |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Yes | No | Yes | No | Yes | No | Yes | No |
|  | X |  |  |  |  |  |  |

If "Yes" to line 2c, provide in Part VI the date the rebate computation was performed
3 Is the bond issue a variable rate issue?
4a Has the organization or the governmental issuer entered into a qualified hedge with respect to the bond issue?
b Name of provider
c Term of hedge
d Was the hedge superintegrated?
e Was the hedge terminated?
10-15-14


Form 990, Part III, Line 4a, Program Service Accomplishments:
own goals and nurture the development of their children. Head Start sites are located throughout Cumberland County. Head Start is part/day part/year. Free program to qualifying families.
-Public PreK Partnerships: Head Start partners with the Public School System. Head Start and Department of Education funds are used to deliver this model. In these classrooms, transportation is provided by the school districts.
-Child Care: offered full-day/full year. We serve children 6 weeks to 5 years old. Subsidized child care fees are on a sliding scale and are based on household income and family size.
-Maine Families: works in partnership with expectant parents and parents of babies and toddlers to ensure safe home environments, promote healthy growth and development for babies and young children, and provide key connections to needed services.

Nutrition Services:

Our Nutrition programs aim to promote child and family wellness by providing nutrition services that supplement and compliment those of the home and community. Our Nutrition Services include:

[^1]program which provides supplemental foods to promote good health for pregnant, postpartum, and breastfeeding women, and infants and children up to age 5.
-Summer Food Service Program: We collaborate with numerous community partners and volunteers to ensure that meals are available Monday-Friday for children during the summer months when school is out.
-Kids Katering: provides quality, nutritious affordable and accessible meals to children and seniors.

Form 990, Part III, Line 4b, Program Service Accomplishments:
-Children's Outpatient Therapy: offers outpatient therapy in both York and Cumberland counties. Licensed therapists work with families to create a therapy best matched to the child's and family's strengths and needs.
-Therapeutic Foster Care: for children and youth removed from their homes by DHHS because of abuse or neglect. Given their experiences, many of these children need additional supervision, stability and care, often at a moment's notice.
-Homeless Youth Services: provides intensive case management for homeless \& street youth, boys and girls ages six to 21. Our Homeless Youth Services (HYS) case managers focus on supporting and stabilizing the client's entire family - siblings and parents, too.
-Behavioral Health Services at Long Creek Youth Development Center: provides comprehensive clinical services to youth ages $11-20$ residing at the Long Creek Youth Development Center and to their family members.
-Detention Response Program: intensive, community-based supervision, monitoring and case management for youth involved, or at risk of being involved with the juvenile justice system.
-Young Parent Program: a parenting education program for young parents who are pregnant, parenting, and or working on reunification. We partner with young parents to support healthy attachments, child development, and connection to community with family centered case management; prenatal education; infant and toddler development; and parenting classes.
-22 Park Avenue: offers housing for six homeless, pregnant or parenting people up to age 22 and their children. The program's goal is to give homeless parents the skills and support they need to feel empowered to make smart decisions and positive choices for their families.
-Edgewood: is a six-bed residential treatment program for youth ages 16 to 21 designed to offer intensive, focused treatment and rehabilitative services to promote a successful return of the youth/young adult to family or community and self-sufficiency.
-Trauma Informed High Fidelity Wraparound: strictly adhering to the practice of High Fidelity Wraparound as defined by the National Wraparound Initiative, our Trauma Informed High Fidelity Wraparound ${ }_{08-27-14}^{432212}$
program works with youth involved in the juvenile justice system and their families statewide.
-Adolescent Community Integration Services: We work with homeless adolescents through our MaineStay residence. Community Integration Service at MaineStay focuses on assisting the adolescents (ages 16-21) plan and implement their goals while residing at MaineStay and once the adolescent leaves MaineStay, whether or not they have completed the full residential program.

Adult Mental Health Services:
-Community Support Services (CSS): provides adult case management for individuals diagnosed with a mental illness and possibly co-occurring addiction disorder.
-Adult Community Integration Services:
For individuals diagnosed with mental illness and possibly co-occurring disorder who are homeless or at risk of homelessness.
-The Women's Project: is a targeted case management program for women affected by substance use (their own or others). The Women's Project addresses barriers to treatment and recovery. The staff also provides information and referral to additional services and supports.
-MaineStay: A Portland-based collaborative program includes an eight-bed residential treatment facility and support services for young adults, 18-25, struggling with homelessness and mental illness. ${ }_{\substack{432212 \\ 08-27-14}}$

Schedule O (Form 990 or 990-EZ) (2014)
-The Bridge: a 12 bed short term residential treatment program for homeless adults with a major mental illness, provides a comprehensive treatment program that assists residents with securing long-term housing while stabilizing their mental health and connecting them to community resources and supports. The Bridge is staffed $24 / 7$ for mental health support and medication administration.
-Gordon Green: An eight-bed permanent residence providing intensive treatment and support for elderly adults under guardianship with a combination of challenges including mental illness and disabilities related to age or physical impairments.
-Helen Winslow Ray House: A seven-bed comprehensive rehabilitation residence providing support, counseling and advocacy for adults with a major mental illness.
-Morrison Place at Randall Street: A 12-bed treatment facility offering intensive individualized treatment of homeless adults with co-occurring mental health and substance abuse issues.

Crisis Services:
-Cumberland County Crisis Response: a comprehensive 24 -hour mental
health crisis system offering phone and face-to-face crisis intervention and stabilization services, including:
-774-HELP: Available 24 hours a day, 365 days a year, 774-HELP(4357)
offers immediate access to crisis intervention, suicide prevention/intervention, crisis/supportive counseling, problem solving services to adults and children throughout Cumberland County.
-Mobile Outreach: Available 24- hours a day, 365 days a year, Mobile Outreach offers face to face crisis intervention services for adults, families and children during a mental health crisis. A range of services includes crisis assessment and intervention and stabilization services.
-Peer \& Family Navigators: Peer \& Family Navigators are consumers of mental health/substance use services and are currently in recovery. They are an integral part of the Mobile Outreach team providing short term supports to help others become and stay engaged in the recovery process to promote recovery.
-Mental Health/Police Liaison: Working closely with the Portland Police Department, this specially trained staff-person provides crisis intervention, assessment, and assistance in facilitating crisis services.
-Broadway Crossings: a short-term therapeutic, crisis stabilization unit that is an alternative to hospitalization for adults experiencing a mental health crisis.

Form 990, Part III, Line 4c, Program Service Accomplishments: program that meets their particular parenting needs. Through individualized support, weekly group meetings, and connection to

resources, we help parents define goals, reduce stress, and strengthen their relationships with their children.
-STRONG Fathers: a program that helps men to become more skilled and active parents through classes, workshops, discussion groups, family activities, and individual mentoring.
-Mediation Services: trained volunteer mediators help people defuse potentially destructive conflicts. This program is run entirely on private donations sought through grants and fundraising efforts. Our mediation program is free and open to anyone who needs the service regardless of ability to pay.
-Supported Visitation: provides supervised visits for parents and their children referred by the state' Office of Children and Family Services in safe and supportive environments conducive to strengths-based parenting education.
-Community Services Case Management: staff provides brief crisis intervention, assessment, work plan development, and information and referral.
-General Assistance Administration: Through contracts with
approximately nine towns in Cumberland County, we serve as the General Assistance Administrators assessing and granting funds to income-eligible individuals and linking them to additional services.
-Healthcare Navigator: The Affordable Care Act (ACA) brings new $\underset{\substack{483212 \\ 08-27-14}}{\substack{4 \\ \hline}}$
requirements for individuals and employers and new options for affordable health coverage for many Mainers. The Healthcare Navigator can assist in enrolling through the ACA marketplace and understanding the new rights, protections, and changes to current government health care programs.
-Community Partnerships for Protecting Children (CPPC): a locally driven, national initiative that aims to enhance the lives of children and their families by engaging neighbors and communities to support families before there is a need for more disruptive and costly intervention.
-The Parkside Neighborhood Center: works to strengthen individuals \& families living in the Parkside neighborhood of Portland by offering educational and cultural opportunities to connect diverse neighbors and promote social and physical well-being. The Center's programming adapts to emerging needs, the list of current program offerings is subject to change.
-The Next Step Loan Fund: is a low interest micro loan program created to help small business owners in Cumberland County start or expand their business, offering a "next step" to a more secure, economically independent life.
-Westbrook Children's Project: promotes healthy development for Westbrook children and youth in an effort to reduce the risks of truancy, school dropouts, substance abuse, juvenile delinquency.
-Maine Youth Action Network (MYAN): Through skill building trainings, networking, leadership opportunities and technical assistance, MYAN empowers and prepares youth to be proactive, involved leaders in their schools and communities .
-Foster Grandparents \& Senior Companions (Senior Volunteer Programs): provides meaningful volunteer opportunities for people age 55 and over, interested in meeting critical community needs in school, child development centers, Head Start, adult day programs and private homes throughout York and Cumberland counties. Volunteers living at less than $200 \%$ of poverty are eligible to receive a non-taxable stipend in return for a 15 - 40 hour a week commitment.
-The Public Health Program: a coalition of communities in western Cumberland County with representatives from health care organizations, nonprofit agencies, schools, law enforcement, and youth to raise awareness of public health.
-2-1-1 Maine: a statewide health and human services information and referral system. It is an easy-to-remember three digit telephone number that helps people in accessing health and human services in their community.
-Housing \& Energy Services: Housing and Energy Services provide relief for income eligible households in heating and energy costs, affordable housing, and repair or replacement of household heating and energy equipment.

Form 990, Part VI, Section B, line 11:
The draft is reviewed by the CFO. The draft is then presented to the Finance Committee by the audit firm. The Finance Committee reviews and makes a recommendation to the full Board of Trustees to approve. The Board of Trustees approves.

Form 990, Part VI, Section B, Line 12c:
The conflict of interest policy or ethics policy is reviewed annually. Statements are sent annually to the Board of Trustees and are signed, returned, and maintained on file. Statements are reviewed by the President and Chair of the Board.

Form 990, Part VI, Section B, Line 15a:
Human Resources is responsible for maintaining current tools to measure market value compensation including surveys at the national, state and industry level. Job descriptions are assigned to various ranges of pay using a matrix that measures responsibility/complexity of job function. Changes to base pay are non-routine and supported with documentation. Supervisors approve compensation. Annually, the Executive Committee acts as a Compensation Committee to review compensation of the President and makes a recommendation to the Board of Trustees, who approves.

Form 990, Part VI, Section C, Line 19: The bylaws, governing policies and audited financial statements are maintained at the administrative offices and are provided to the public upon request.

Related Organizations and Unrelated Partnerships
$>$ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

## - Attach to Form 990.

Department of the Treasury
nternal Revenue Service
Name of the organization
Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

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


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

 organizations during the tax year.| (a) <br> Name, address, and EIN of related organization | (b) <br> Primary activity | (c) <br> Legal domicile (state or foreign country) | (d) <br> Exempt Code section | (e) <br> Public charity status (if section 501(c)(3)) | (f) <br> Direct controlling entity | (g) <br> Section $512(b)(13)$ <br> controlled entity? |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  | Yes | No |
| Ingraham Housing Corporation - 01-0495250 <br> 50 Monument Square <br> Portland, ME 04101 | pbtains low income housing financing and lease properties | Maine | 501(c)(3) | Line 11a, I | The Opportunity <br> Alliance | X |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

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

Part III $\begin{aligned} & \text { Identification of Related Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line } 34 \text { because it had one or more related } \\ & \text { organizations treated as a partnership during the tax year. }\end{aligned}$ organizations treated as a partnership during the tax year.

 organizations treated as a corporation or trust during the tax year.


Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35 b, or 36.
Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.
1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity
b Gift, grant, or capital contribution to related organization(s)
c Gift, grant, or capital contribution from related organization(s)
d Loans or loan guarantees to or for related organization(s)
e Loans or loan guarantees by related organization(s)
f Dividends from related organization(s)
g Sale of assets to related organization(s)
h Purchase of assets from related organization(s)
i Exchange of assets with related organization(s)
j Lease of facilities, equipment, or other assets to related organization(s)
k Lease of facilities, equipment, or other assets from related organization(s)
I Performance of services or membership or fundraising solicitations for related organization(s)
$\mathbf{m}$ Performance of services or membership or fundraising solicitations by related organization(s)
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)
o Sharing of paid employees with related organization(s)
p Reimbursement paid to related organization(s) for expenses
q Reimbursement paid by related organization(s) for expenses
$\mathbf{r}$ Other transfer of cash or property to related organization(s)
s Other transfer of cash or property from related organization(s)
2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| Name of related organization | (a) <br> Transaction <br> type (as) | (c) <br> Amount involved | (d) <br> Method of determining amount involved |
| :--- | :---: | :---: | :---: |
| (1) Ingraham Housing Corporation | K | $136,842$. Cash Value |  |
| (2) |  |  |  |
| (3) |  |  |  |
| (4) |  |  |  |
| (5) |  |  |  |
| (6) |  |  |  |
| 432163 08-14-14 |  |  |  |

Part VI Unrelated Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 37.
 that was not a related organization. See instructions regarding exclusion for certain investment partnerships


Provide additional information for responses to questions on Schedule R (see instructions).

## Exempt Organization Business Income Tax Return (and proxy tax under section 6033(e))

Department of the Treasury Internal Revenue Service

## For calendar

$\qquad$ , and endin JU Do not enter SSN numbers on this form as it may be made public if your organization is a $501(\mathrm{c})(3)$.

Opento Puolc inspectiontior $501(c)(3)$ Organizations Only

| A | Check box if address changed |
| :---: | :---: |
| B Exempt under section |  |
| X 501(c)(3) |  |
| 408(e) $\square$ 220(e) |  |
| 408A $\square$ 530(a) |  |
| 529(a) |  |
| $\begin{aligned} & \text { C Book value of all assets } \\ & 17,010,344 . \end{aligned}$ |  |

Name of organization ( $\square$ Check box if name changed and see instructions.)
Print
The Opportunity Alliance
Number, street, and room or suite no. If a P.0. box, see instructions. 50 Monument Square
City or town, state or province, country, and ZIP or foreign postal code Portland, ME 04101

531120

| $17,010,344$ | G Check organization type | X | 501(c) corporation |  | 501(c) trust |  | 401(a) trust |  | Other trust |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| H Describe the organization's primary unrelated business activity. Rental of Nonresidential Debt-Fin. Property |  |  |  |  |  |  |  |  |  |



| J The books are in care of $>$ Dawn Ouellette |  |  | Telephone number - (207) |  | 523-5021 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Part I | Unrelated Trade or Business Income |  | (A) Income | (B) Expenses | (C) Net |
| 1a Gross receipts or sales <br> b Less returns and allowances $\square$ c Balance <br> 2 Cost of goods sold (Schedule A, line 7) <br> 3 Gross profit. Subtract line 2 from line 1c <br> 4a Capital gain net income (attach Schedule D) <br> b Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797) <br> c Capital loss deduction for trusts <br> 5 Income (loss) from partnerships and S corporations (attach statement) <br> 6 Rent income (Schedule C) <br> 7 Unrelated debt-financed income (Schedule E) <br> 8 Interest, annuities, royalties, and rents from controlled organizations (Sch. F)... <br> 9 Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G) <br> 10 Exploited exempt activity income (Schedule I) <br> 11 Advertising income (Schedule J) <br> 12 Other income (See instructions; attach schedule) <br> 13 Total. Combine lines 3 through 12. |  | 1 c |  |  |  |
|  |  | 2 |  |  |  |
|  |  | 3 |  |  |  |
|  |  | 4a |  |  |  |
|  |  | 4b |  |  |  |
|  |  | 4c |  |  |  |
|  |  | 5 |  |  |  |
|  |  | 6 |  |  |  |
|  |  | 7 | 186,303. | 154,615. | 31,688. |
|  |  | 8 |  |  |  |
|  |  | 9 |  |  |  |
|  |  | 10 |  |  |  |
|  |  | 11 |  |  |  |
|  |  | 12 |  |  |  |
|  |  | 13 | 186,303. | 154,615. | 31,688. |


\section*{| Part II | Deductions Not Taken Elsewhere (See instructions for limitations on deductions.) |
| :--- | :--- |}

(Except for contributions, deductions must be directly connected with the unrelated business income.)

| 14 | Compensation of officers, directors, and trustees (Schedule K) |  | 14 |  |
| :---: | :---: | :---: | :---: | :---: |
| 15 | Salaries and wages |  | 15 |  |
| 16 | Repairs and maintenance |  | 16 |  |
| 17 | Bad debts |  | 17 |  |
| 18 | Interest (attach schedule) |  | 18 |  |
| 19 | Taxes and licenses |  | 19 |  |
| 20 | Charitable contributions (See instructions for limitation rules) |  | 20 |  |
| 21 | Depreciation (attach Form 4562) ...................................................................... 21 | $21 \quad 58,313$. |  |  |
| 22 | Less depreciation claimed on Schedule A and elsewhere on return ................................. 22 La | 2 a 58,313. | 22b | 0 - |
| 23 | Depletion |  | 23 |  |
| 24 | Contributions to deferred compensation plans |  | 24 |  |
| 25 | Employee benefit programs |  | 25 |  |
| 26 | Excess exempt expenses (Schedule I) |  | 26 |  |
| 27 | Excess readership costs (Schedule J) |  | 27 |  |
| 28 | Other deductions (attach schedule) |  | 28 |  |
| 29 | Total deductions. Add lines 14 through 28 |  | 29 | 0 - |
| 30 | Unrelated business taxable income before net operating loss deduction. Subtract line 29 from line 13 |  | 30 | 31,688. |
| 31 | Net operating loss deduction (limited to the amount on line 30) $\qquad$ See Statement 1 |  | 31 | 31,688. |
| 32 |  |  | 32 | 0 |
| 33 | Unrelated business taxable income before specific deduction. Subtract line 31 from line 30 <br> Specific deduction (Generally $\$ 1,000$, but see line 33 instructions for exceptions) |  | 33 | 1,000. |
| 34 | Unrelated business taxable income. Subtract line 33 from line 32 . If line 33 is greater than line 32, enter the smaller of zero or line 32 |  | 34 | 0 . |

## Part III Tax Computation

35 Organizations Taxable as Corporations. See instructions for tax computation.
Controlled group members (sections 1561 and 1563) check here $\square$ See instructions and:
a Enter your share of the $\$ 50,000, \$ 25,000$, and $\$ 9,925,000$ taxable income brackets (in that order):
(1) $\$$
(2) $\$$
$\square$
(3) $\$$
b Enter organization's share of: (1) Additional 5\% tax (not more than \$11,750)
(2) Additional $3 \%$ tax (not more than $\$ 100,000$ )
$\$$
Income tax on the amount on line 34
36 Trusts Taxable at Trust Rates. See instructions for tax computation. Income tax on the amount on line 34 from:Tax rate schedule or
 Schedule D (Form 1041)
37 Proxy tax. See instructions
38 Alternative minimum tax
39 Total. Add lines 37 and 38 to line 35 c or 36 , whichever applies


Part IV $\quad$ Tax and Payments

| 40a Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116) | 40a |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| b Other credits (see instructions) | 40b |  |  |  |
| c General business credit. Attach Form 3800 | 40c |  |  |  |
| d Credit for prior year minimum tax (attach Form 8801 or 8827) | 40d |  |  |  |
| e Total credits. Add lines 40a through 40d |  |  | 40e |  |
| 41 Subtract line 40e from line 39 |  |  | 41 | 0 |
| 42 Other taxes. Check if from: $\square$ Form $4255 \square$ Form $8611 \square$ Form $8697 \square$ Form 88 |  | Other (attach schedule) | 42 |  |
| 43 Total tax. Add lines 41 and 42 |  |  | 43 | 0 。 |
| 44 a Payments: A 2013 overpayment credited to 2014 | 44a |  |  |  |
| b 2014 estimated tax payments | 44b |  |  |  |
| c Tax deposited with Form 8868 | 44c |  |  |  |
| d Foreign organizations: Tax paid or withheld at source (see instructions) | 44d |  |  |  |
| e Backup withholding (see instructions) | 44e |  |  |  |
| f Credit for small employer health insurance premiums (Attach Form 8941) | 44f |  |  |  |
| g Other credits and payments: $\square$ Form 2439 $\square$ Other <br> $\square$ Form 4136 $\square$ Total  | 44g |  |  |  |
| 45 Total payments. Add lines 44a through 44 g |  |  | 45 |  |
| 46 Estimated tax penalty (see instructions). Check if Form 2220 is attached |  |  | 46 |  |
| 47 Tax due. If line 45 is less than the total of lines 43 and 46 , enter amount owed |  |  | 47 | 0 |
| 48 Overpayment. If line 45 is larger than the total of lines 43 and 46 , enter amount overpaid |  | $\checkmark$ | 48 | 0 . |
| 49 Enter the amount of line 48 you want: Credited to 2015 estimated tax |  | Refunded | 49 |  |

## Part V $\quad$ Statements Regarding Certain Activities and Other Information (see instructions)

1 At any time during the 2014 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If YES, the organization may have to file Form FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If YES, enter the name of the foreign country here
2 During the tax year, did the organization receive a distribution from, or was it the grantor of, or transieror to, a forelgn trust? If YES, see instructions for other forms the organization may have to file.
3 Enter the amount of tax-exempt interest received or accrued during the tax year \$
Schedule A - Cost of Goods Sold. Enter method of inventory valuation $\boldsymbol{N} /$ A

| 1 Inventory at beginning of year | 1 |  |  |  | 6 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 2 Purchases | 2 |  | 7 | Cost of goods sold. Subtract line 6 from line 5. Enter here and in Part I, line 2 |  |  |  |
| 3 Cost of labor. | 3 |  |  |  | 7 |  |  |
| 4a Additional section 263A costs (att. schedule) | 4a |  | 8 | Do the rules of section 263A (with respect to property produced or acquired for resale) apply to the organization? |  | Yes | No |
| b Other costs (attach schedule) | 4b |  |  |  |  |  |  |
| 5 Total. Add lines 1 through 4b | 5 |  |  |  |  |  |  |



## Schedule C - Rent Income (From Real Property and Personal Property Leased With Real Property)(see instructions)

1. Description of property

| (1) |
| :--- | :--- | :--- |
| (2) |

## Schedule E - Unrelated Debt-Financed Income (see instructions)

| 1. Description of debt-financed property |  | 2. Gross income from or allocable to debtfinanced property | 3. Deductions directly connected with or allocable to debt-financed property |  |
| :---: | :---: | :---: | :---: | :---: |
|  |  | (a) Straight line depreciation (attach schedule) | (b) Other deductions (attach schedule) |
|  |  | Statement 2 | Statement 3 |
| (1) 50 Monument Square - Portland |  |  |  |  |  |
| (2) Maine |  |  | 251,218. | 61,653. | 146,835. |
| (3) |  |  |  |  |
| (4) |  |  |  |  |
| 4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule) | 5. Average adjusted basis of or allocable to debt-financed property attach schedule) | 6. Column 4 divided by column 5 | 7. Gross income reportable (column $2 \times$ column 6) | 8. Allocable deductions (column $6 \times$ total of columns 3 (a) and 3 (b)) |
| (1) |  | \% |  |  |
| (2) | 1,755,785. | $74.16 \%$ | 186,303. | 154,615. |
| (3) |  | \% |  |  |
| (4) |  | \% |  |  |
| Totals .............................................................Total dividends-received deductions included in column 8 |  |  | Enter here and on page 1 , Part I, line 7, column (A). | Enter here and on page 1 , Part I, line 7, column (B). |
|  |  | - | 186, 303. | 154,615. |
|  |  |  | .................. $>$ | 0 - |

Total dividends-received deductions included in column 8
Schedule F - Interest, Annuities, Royalties, and Rents From Controlled Organizations (see instructions)


Form 990-T (2014) The Opportunity Alliance

| Schedule G - Investment Income of a Section 501(c)(7), (9), or (17) Organization |
| :--- |
| (see instructions) |
| 1. Description of income |
| $(1)$ |
| $(2)$ |
| $(3)$ |
| $(4)$ |
| 2. Amount of income | | 3. Deductions <br> directly connected <br> (attach schedule) |
| :---: |
| 4. Set-asides <br> (attach schedule) |
| 5. Total deductions <br> and set-asides <br> (col. 3 plus col. 4) |

## Schedule I - Exploited Exempt Activity Income, Other Than Advertising Income

| 1. Description of exploited activity | 2. Gross unrelated business income from trade or business | 3. Expenses directly connected with production of unrelated business income | 4. Net income (loss) from unrelated trade or business (column 2 minus column 3). If a gain, compute cols. 5 through 7. | 5. Gross income from activity that is not unrelated business income | 6. Expenses attributable to column 5 | 7. Excess exempt expenses (column 6 minus column 5 , but not more than column 4). |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| (1) |  |  |  |  |  |  |
| (2) |  |  |  |  |  |  |
| (3) |  |  |  |  |  |  |
| (4) |  |  |  |  |  |  |
| Totals ......................... $>$ | Enter here and on page 1, Part I, line 10, col. (A). | Enter here and on page 1, Part I, line 10, col. (B). 0 |  |  |  | Enter here and on page 1, <br> Part II, line 26. $\qquad$ |

Schedule J - Advertising Income (see instructions)
Part I Income From Periodicals Reported on a Consolidated Basis

| 1. Name of periodical | 2. Gross advertising income | 3. Direct advertising costs | 4. Advertising gain or (loss) (col. 2 minus col. 3). If a gain, compute cols. 5 through 7 | 5. Circulation income | 6. Readership costs | 7. Excess readership costs (column 6 minus column 5 , but not more than column 4). |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| (1) |  |  |  |  |  |  |
| (2) |  |  |  |  |  |  |
| (3) |  |  |  |  |  |  |
| (4) |  |  |  |  |  |  |
| Totals (carry to Part II, line (5)) | 0 . | 0. |  |  |  | 0 . |

Part II Income From Periodicals Reported on a Separate Basis (For each periodical listed in Part II, fill in
columns 2 through 7 on a line-by-line basis.)


Schedule K - Compensation of Officers, Directors, and Trustees (see instructions)

| 1. Name | 2. Title | $\begin{aligned} & \text { 3. Percent of } \\ & \text { time devoted to } \\ & \text { business } \end{aligned}$ | 4. Compensation attributable to unrelated business |
| :---: | :---: | :---: | :---: |
| (1) |  | \% |  |
| (2) |  | \% |  |
| (3) |  | \% |  |
| (4) |  | \% |  |
| Total. Enter here and on page 1, Part II, line 14 ........................................................................................ |  |  | 0 - |
|  |  |  | Form 990-T (2014) |

01-13-15

| Form 990-T |  | Ne | Operating Loss | Deduction | Statement |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Tax Year | Loss | Sustained | Loss Previously Applied | Loss <br> Remaining | Available This Year |
| 06/30/08 |  | 34,137. | 22,944. | 11,193. | 11,193. |
| 06/30/09 |  | 56,986. | 0. | 56,986. | 56,986. |
| 06/30/10 |  | 18,109. | 0 . | 18,109. | 18,109. |
| 06/30/11 |  | 36,200. | 0. | 36,200. | 36,200. |
| 06/30/12 |  | 132,554. | 0 . | 132,554. | 132,554. |
| 01/31/13 |  | 31,662. | 0. | 31,662. | 31,662. |
| 06/30/13 |  | 69,635. | 0 . | 69,635. | 69,635. |
| NOL Carryover Available This Year |  |  |  | 356,339. | 356,339. |


| Form 990-T | Schedule $\mathrm{E}-\mathrm{Depreciation} \mathrm{Deduction}$ | Statement 2 |
| :--- | ---: | :--- |


| Form 990-T | Schedule E - Other | Deductio |  | Statement | 3 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Description |  | Activity Number | Amount | Total |  |
| Repairs \& Maintenance |  |  | 22,736. |  |  |
| Supplies |  |  | 688. |  |  |
| Utilities |  |  | 33,228. |  |  |
| Miscellaneous |  |  | 72. |  |  |
| Insurance |  |  | 5,072. |  |  |
| Property Taxes |  |  | 32,799. |  |  |
| Interest | - SubTotal - | 1 | 52,240. | 146 , | 35. |
| Total of Form 990-T, S | Schedule E, Column | (b) |  | 146, | 35. |

Depreciation and Amortization (Including Information on Listed Property)

Attach to your tax return.
Department of the Treasury (99)

Information about Form 4562 and its separate
E-

Information about Form 4562 and its separate instructions is at www.irs, gov/form4562.

The Opportunity Alliance
Portland Maine
01-0274725


Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

\section*{| Part II | Special Depreciation Allowance and Other Depreciation (Do not include listed property.) |
| :--- | :--- |}

14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year
15 Property subject to section 168(f)(1) election
16 Other depreciation (including ACRS)

|  |  |
| :--- | :--- |
| 14 |  |
| 15 |  |
| 16 |  |


| Part III | MACRS Depreciation (Do not include listed property.) (See instructions.) |
| :--- | :--- |

## Section A


18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here
Section B - Assets Placed in Service During 2014 Tax Year Using the General Depreciation System

|  | (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investmetions) only - see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 19a | 3 -year property |  |  |  |  |  |  |
| b | 5-year property |  |  |  |  |  |  |
| c | 7-year property |  |  |  |  |  |  |
| d | 10-year property |  |  |  |  |  |  |
| e | 15-year property |  |  |  |  |  |  |
| f | 20-year property |  |  |  |  |  |  |
| g | 25-year property |  |  | 25 yrs. |  | S/L |  |
| h | Reidential rental property | 1 |  | 27.5 yrs. | MM | S/L |  |
|  | Residential rental property | 1 |  | 27.5 yrs. | MM | S/L |  |
|  | Nonresidential real property | 1 |  | 39 yrs . | MM | S/L |  |
|  | Nomresidential real property | 1 |  |  | MM | S/L |  |

## Section C - Assets Placed in Service During 2014 Tax Year Using the Alternative Depreciation System



Part IV Summary (See instructions.)
21 Listed property. Enter amount from line 28
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr.
23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs


416251
$01-08-15$
LHA For Paperwork Reduction Act Notice, see separate instructions.

| Part V <br> Listed Pr <br> recreation <br> Note: For <br> through | Listed Property (Include automobiles, certain other vehicles, certain aircraft, certain computers, and property used for entertainment, recreation, or amusement.) <br> Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable. |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Section A Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.) |  |  |  |  |  |  |  |  |  |  |
| 24a Do you have evidence to support the business/investment use claimed? |  |  |  | Yes | No | 24b If "Yes," is the evidence written? |  |  |  | Yes $\square$ No |
| (a) <br> Type of property (list vehicles first) | (b) Date placed in service | (c) <br> Business/ investment use percentage | (d) <br> Cost or other basis | Basis for (busines us |  | (f) <br> Recovery period |  |  | (h) <br> Depreciation deduction | (i) Elected section 179 cost |
| 25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than $50 \%$ in a qualified business use. |  |  |  |  |  |  |  |  |  |  |
| 26 Property used more than 50\% in a qualified business use: |  |  |  |  |  |  |  |  |  |  |
|  | $\vdots \quad \vdots$ | \% |  |  |  |  |  |  |  |  |
|  | $\vdots \quad \vdots$ | \% |  |  |  |  |  |  |  |  |
|  | $\vdots \quad \vdots$ | \% |  |  |  |  |  |  |  |  |
| 27 Property used 50\% or less in a qualified business use: |  |  |  |  |  |  |  |  |  |  |
|  |  | \% |  |  |  |  | S/L. |  |  |  |
|  | $\vdots \quad \vdots$ | \% |  |  |  |  | S/L. |  |  |  |
|  | $\vdots \quad \vdots$ | \% |  |  |  |  | S/L - |  |  |  |
| 28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 ........................... 28 |  |  |  |  |  |  |  |  |  |  |
| 29 Add amounts in column (i), line 26. Enter here and on line 7, page 1 |  |  |  |  |  |  |  |  | $\ldots$ |  |

## Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than $5 \%$ owner," or related person. If you provided vehicles to your employees, first answer the questions in Section $C$ to see if you meet an exception to completing this section for those vehicles.

30 Total business/investment miles driven during the year (do not include commuting miles)
31 Total commuting miles driven during the year
32 Total other personal (noncommuting) miles driven
33 Total miles driven during the year.
Add lines 30 through 32
34 Was the vehicle available for personal use during off-duty hours?
35 Was the vehicle used primarily by a more than $5 \%$ owner or related person?
36 Is another vehicle available for personal use?


## Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than $5 \%$ owners or related persons.
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your
employees?
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your
employees? See the instructions for vehicles used by corporate officers, directors, or $1 \%$ or more owners
39 Do you treat all use of vehicles by employees as personal use?
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?
41 Do you meet the requirements concerning qualified automobile demonstration use?
Note: If your answer to 37, 38, 39, 40, or 41 is "Yes, " do not complete Section B for the covered vehicles.

\section*{| Part VI | Amortization |
| :--- | :--- |}




[^0]:    LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

[^1]:    -Women, Infants and Children (WIC): WIC is a nutritional education

