Form **990** 

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)

OMB No. 1545-0047

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

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

Inspection

| A For the 20   | )20 calendar year, or tax year beginning $$ OCT $1$ , $$ $2020$ $$ and                        | ending S         | SEP 30, 2021                         |                               |
|--|---|------------------|--------------------------------------|-------------------------------|
| B Check if applicable:   | C Name of organization INTERNATIONAL INSTITUTE OF NEW ENGLAN                                  | D                | D Employer identifi                  | cation number                 |
| Address change   | INC.  |                  |                                      |                               |
| Name change  | Doing business as   |                  | 04-21043                             | 25                            |
| Initial return Final return/   | Number and street (or P.O. box if mail is not delivered to street address)  2 BOYLSTON STREET | Room/suite 3 0 0 | E Telephone number (617)695          |                               |
| termin-<br>ated  | City or town, state or province, country, and ZIP or foreign postal code                      | l                | G Gross receipts \$                  | 8,265,388.                    |
| Amended  | BOSTON, MA 02116  |                  | H(a) Is this a group r               |                               |
| Applica-   | F Name and address of principal officer: CELINE MUKASINE                                      |                  | for subordinates                     |                               |
| pending  | SAME AS C ABOVE   |                  | H(b) Are all subordinates i          | ncluded? Yes No               |
|  | ot status: $X = 501(c)(3) = 501(c)(6)$ (insert no.) $4947(a)(1)$                              | or 527           | If "No," attach a                    | list. See instructions        |
|  | HTTP://IINE.ORG   |                  | H(c) Group exemption                 |                               |
|  | anization: X Corporation Trust Association Other ►  | <b>L</b> Year    | of formation: 1924                   | M State of legal domicile: MA |
|  | ummary  | 4                |                                      |                               |
| 0 1 Brie   | efly describe the organization's mission or most significant activities: THE                  | MISSIC           | N OF THE IN                          | TERNATIONAL                   |
| 2 Che 3 Nui  | ISTITUTE OF NEW ENGLAND (IINE) IS TO HE   |                  |                                      |                               |
| E 2 Che  | eck this box 🕨 📖 if the organization discontinued its operations or dispo                     |                  | 1                                    |                               |
| [ 3 Nui  |   |                  | 3                                    | 16                            |
| <b>⊗</b> 4 Nui   | mber of independent voting members of the governing body (Part VI, line 1b)                   |                  |                                      | 15                            |
| <u>§</u> 5 Tot   | al number of individuals employed in calendar year 2020 (Part V, line 2a)                     |                  |                                      | 167                           |
|  | al number of volunteers (estimate if necessary)   |                  |                                      | 103                           |
| ষ্ট   7a Tot   | al unrelated business revenue from Part VIII, column (C), line 12                             |                  |                                      | 0.                            |
| b Net  | t unrelated business taxable income from Form 990-T, Part I, line 11                          | ·····            |                                      | 0.                            |
|  |   |                  | Prior Year 6,483,372.                | Current Year 7,529,103.       |
| 9 8 Coi  | ntributions and grants (Part VIII, line 1h)   |                  | 388,242.                             |                               |
|  | gram service revenue (Part VIII, line 2g)   |                  |                                      | -                             |
| စ် 10 Inv  | estment income (Part VIII, column (A), lines 3, 4, and 7d)                                    |                  | 257,266.                             |                               |
|  | ner revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)                        |                  | -82,731.                             |                               |
|  | al revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)               |                  | 7,046,149.                           |                               |
| l l  | ants and similar amounts paid (Part IX, column (A), lines 1-3)                                |                  | 361,974.                             | 617,377.                      |
| l  | nefits paid to or for members (Part IX, column (A), line 4)                                   |                  |                                      | <b>.</b>                      |
|  | aries, other compensation, employee benefits (Part IX, column (A), lines 5-10)                |                  | 4,564,480.                           | 39,450.                       |
| <b>2   16a</b> Pro   | ofessional fundraising fees (Part IX, column (A), line 11e)                                   |                  | 0.                                   | 39,430.                       |
| b lot  | al fundraising expenses (Part IX, column (D), line 25) 794, 6                                 | <del></del>      | 1,612,037.                           | 2,045,725.                    |
| _   <b>17</b> Otr  | ner expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                                    |                  | 6,538,491.                           |                               |
|  | al expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)                        |                  | 507,658.                             |                               |
| 19 Rev   | venue less expenses. Subtract line 18 from line 12  |                  |                                      |                               |
| Net Assets or Ne | L   | Be               | eginning of Current Year 10,563,466. | End of Year<br>12,158,874.    |
| Tot  | al assets (Part X, line 16)   |                  | 1,327,403.                           |                               |
| 4 21 Tot   | al liabilities (Part X, line 26)  |                  | 9,236,063.                           |                               |
| Z군 22 Net Part II S  | t assets or fund balances. Subtract line 21 from line 20                                      |                  | 9,230,003.                           | 11,031,003.                   |
|  | s of perjury, I declare that have examined this return, including accompanying schedule       | ac and etatem    | ante and to the heet of m            | v knowledge and helief it is  |
| -  | nd complete. Declaration of propagation of the relation of the propagation of w               |                  |                                      | y knowledge and belief, it is |
| inde, correct, ar  | To complete. Because of other than officer) is based on an information of w                   | πιστι μισμαισι   | 6/23/2                               | 022                           |
| Sign   | Signature of officer  |                  |                                      | 022                           |
| Here   | CELINE MUKASINE, CFO  |                  |                                      |                               |
| Tiere  | Type or print name and title  |                  |                                      |                               |
| Pri  | int/Type preparer's name Preparer's signature   |                  | Date Check                           | PTIN                          |
|  | ATIE BELANGER, CPA KATIE BELANGER,  | CPA 0            | 06/20/22 if self-employ              | P01585213                     |
| <del></del>  | m's name AAFCPAS, INC.  |                  | Firm's EIN                           | 04-2571780                    |
|  | m's address 50 WASHINGTON STREET  |                  | Tim o Life                           | • •                           |
|  | WESTBOROUGH, MA 01581   |                  | Phone no 50                          | 8-366-9100                    |
| May the IRS  | discuss this return with the preparer shown above? See instructions                           |                  | 11 110110 110.5 0                    | X Yes No                      |
| 032001 12-23-20  |   | ions.            |                                      | Form <b>990</b> (2020)        |

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|           | rt III   Statement of Program Service Accomplishments  |
|-----------|--|
| . u       | Check if Schedule O contains a response or note to any line in this Part III   |
| 1         | Briefly describe the organization's mission:   |
| •         | SEE PART I, LINE 1.  |
|           | <del></del>  |
|           |  |
|           |  |
| 2         | Did the organization undertake any significant program services during the year which were not listed on the                                 |
| _         | prior Form 990 or 990-EZ?  |
|           | If "Yes," describe these new services on Schedule O.   |
| 3         | Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X No                        |
| Ū         | If "Yes," describe these changes on Schedule O.  |
| 4         | Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.         |
| •         | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and |
|           | revenue, if any, for each program service reported.  |
| 4a        | 0.540.660 000.040 100.410  |
|           | BOSTON FIELD OFFICE: IN FY2021, IINE-BOSTON HELPED SECURE HOUSING FOR  |
|           | GROUPS OF NEWLY ARRIVED INDIVIDUALS AND USED FEDERAL AND PRIVATE   |
|           | FUNDING, INCLUDING COVID-19 EMERGENCY RELIEF FUNDING, TO HELP REFUGEES   |
|           | PURCHASE BASIC NECESSITIES SUCH AS FOOD, HOUSEWARES, AND CLOTHING. IINE  |
|           | CONTINUED TO WORK HARD TO FUNDRAISE AND DISTRIBUTE RESOURCES TO  |
|           | MITIGATE CLIENT FOOD AND HOUSING INSECURITY CREATED BY THE COVID-19  |
|           | PANDEMIC. ADDITIONALLY, LOCAL RESIDENTS, CHURCH GROUPS, AND OTHER  |
|           | VOLUNTEERS PROVIDED IN-KIND GIFTS OF ITEMS IN SUPPORT OF NEW AND   |
|           | RESETTLED REFUGEES AND OTHER VULNERABLE IMMIGRANT POPULATIONS SUCH AS  |
|           | CHILD AND ADULT SURVIVORS OF HUMAN TRAFFICKING.  |
|           | CASE MANAGEMENT SERVICES - IINE STAFF OFFERED EXTENSIVE ORIENTATION TO   |
|           | ENSURE CLIENTS WERE ABLE TO NAVIGATE AND PARTICIPATE IN THEIR NEW  |
| 4b        | (Code: ) (Expenses \$ 1,099,170 • including grants of \$ 231,836 • ) (Revenue \$ 48,510 • )  |
|           | LOWELL FIELD OFFICE: IN FY2021, IINE - LOWELL HELPED SECURE HOUSING FOR  |
|           | GROUPS OF NEWLY ARRIVED INDIVIDUALS AND USED FEDERAL AND PRIVATE   |
|           | FUNDING, INCLUDING COVID-19 EMERGENCY RELIEF FUNDING, TO HELP NEW  |
|           | ARRIVALS PURCHASE BASIC NECESSITIES SUCH AS FOOD, HOUSEWARES, AND  |
|           | CLOTHING. IN ADDITION, IINE WORKED HARD TO FUNDRAISE AND DISTRIBUTE  |
|           | RESOURCES TO MITIGATE CLIENT FOOD AND HOUSING INSECURITY CREATED BY THE  |
|           | COVID-19 PANDEMIC. ADDITIONALLY, LOCAL RESIDENTS, CHURCH GROUPS, AND   |
|           | OTHER VOLUNTEERS PROVIDED IN-KIND GIFTS OF ITEMS IN SUPPORT OF NEW AND   |
|           | RESETTLED REFUGEES AND OTHER VULNERABLE IMMIGRANT POPULATIONS.   |
|           | CASE MANAGEMENT SERVICES - IINE STAFF OFFERED EXTENSIVE ORIENTATION TO   |
|           | ENSURE CLIENTS WERE ABLE TO NAVIGATE AND PARTICIPATE IN THEIR NEW  |
|           | COMMUNITIES. WE ALSO HELPED REMOVE BARRIERS TO ACCESSING SUPPORT: WE   |
| 4c        | (Code:) (Expenses \$ 1,063,333. including grants of \$ 111,824.) (Revenue \$ 158,084.)   |
|           | MANCHESTER FIELD OFFICE: IN FY2021, IINE-MANCHESTER HELPED SECURE  |
|           | HOUSING FOR GROUPS OF NEWLY ARRIVED REFUGEES AND USED FEDERAL AND  |
|           | PRIVATE FUNDING, INCLUDING COVID-19 EMERGENCY RELIEF FUNDING, TO HELP  |
|           | NEW ARRIVALS PURCHASE BASIC NECESSITIES SUCH AS FOOD, HOUSEWARES, AND  |
|           | CLOTHING. IN ADDITION, IINE WORKED HARD TO FUNDRAISE AND DISTRIBUTE  |
|           | RESOURCES TO MITIGATE CLIENT FOOD AND HOUSING INSECURITY CREATED BY THE  |
|           | COVID-19 PANDEMIC. ADDITIONALLY, LOCAL RESIDENTS, CHURCH GROUPS, AND   |
|           | OTHER VOLUNTEERS PROVIDED IN-KIND GIFTS OF ITEMS IN SUPPORT OF NEW AND   |
|           | RESETTLED REFUGEES AND OTHER VULNERABLE IMMIGRANT POPULATIONS.   |
|           | CASE MANAGEMENT SERVICES - IINE-MANCHESTER STAFF OFFERED EXTENSIVE   |
|           | ORIENTATION TO ENSURE CLIENTS WERE ABLE TO NAVIGATE AND PARTICIPATE IN   |
|           | THEIR NEW COMMUNITIES. WE ALSO HELPED REMOVE BARRIERS TO ACCESSING   |
| 4d        | Other program services (Describe on Schedule O.)   |
|           | (Expenses \$ including grants of \$ ) (Revenue \$ )  |
| <u>4e</u> | Total program service expenses ► 4,706,171.  |
|           | Form <b>990</b> (2020  |

Part IV Checklist of Required Schedules

|     |  |              | Yes | No       |
|-----|--|--------------|-----|----------|
| 1   | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?  If "Yes," complete Schedule A   | 1            | Х   |          |
| 2   | Is the organization required to complete Schedule B, Schedule of Contributors?   | 2            | Х   |          |
| 3   | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for  |              |     | v        |
|     | public office? If "Yes," complete Schedule C, Part I   | 3            |     | X        |
| 4   | <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If</i> "Yes," <i>complete Schedule C, Part II</i>                                      | 4            | х   |          |
| 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   | 5            |     | X        |
| 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 | 6            |     | x        |
| 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   | 7            |     | X        |
| 8   | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III  | 8            |     | х        |
| 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  | 9            |     | х        |
| 10  | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments   |              |     |          |
|     | or in quasi endowments? If "Yes," complete Schedule D, Part V  | 10           |     | X        |
| 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.  |              |     |          |
| а   | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,  |              |     |          |
|     | Part VI  | 11a          | X   |          |
| 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   | 11b          |     | x        |
| С   | 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   | 11c          |     | X        |
| 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  | 11d          |     | х        |
| е   | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X  | 11e          | Х   |          |
| 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   | 11f          | Х   |          |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII   | 12a          | Х   |          |
| 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  | 12b          |     | Х        |
| 13  | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E  | 13           |     | Х        |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States?  | 14a          |     | Х        |
| 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   | 14b          |     | X        |
| 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   | 15           |     | х        |
| 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  | 16           |     | X        |
| 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   | 17           | х   |          |
| 18  | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines   | <b>-'</b> '- |     | $\vdash$ |
| .5  | 1c and 8a? If "Yes," complete Schedule G, Part II  | 18           |     | х        |
| 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  | 19           |     | Х        |
| 20a | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H  | 20a          |     | Х        |
|     | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?   | 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  | 21           |     | Х        |

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Part IV Checklist of Required Schedules (continued)

|      |   |            | Yes | No  |
|------|---|------------|-----|-----|
| 22   | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on   |            | 163 | NO  |
|      | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III   | 22         | х   |     |
| 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  | 23         | Х   |     |
| 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 24b through 24d and complete  |            |     |     |
|      | Schedule K. If "No," go to line 25a   | 24a        |     | Х   |
| b    | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?   | 24b        |     |     |
| С    | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease  |            |     |     |
|      | any tax-exempt bonds?   | 24c        |     |     |
|      | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?   | 24d        |     |     |
| 25 a | 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   | 25a        |     | X   |
| 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   |            |     | 3,7 |
|      | Schedule L, Part I  | 25b        |     | X   |
| 26   | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current   |            |     |     |
|      | or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%   |            |     | х   |
| 07   | controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II  | 26         |     |     |
| 27   | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,   |            |     |     |
|      | creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III. | 27         |     | Х   |
| 28   | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV   | 21         |     |     |
| 20   | instructions, for applicable filing thresholds, conditions, and exceptions):  |            |     |     |
| а    | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If</i>   |            |     |     |
| _    | "Yes," complete Schedule L, Part IV   | 28a        |     | х   |
| b    | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV   | 28b        |     | Х   |
|      | A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? If   |            |     |     |
|      | "Yes," complete Schedule L, Part IV   | 28c        |     | Х   |
| 29   | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M  | 29         | Х   |     |
| 30   | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation   |            |     |     |
|      | contributions? If "Yes," complete Schedule M  | 30         |     | Х   |
| 31   | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I  | 31         |     | Х   |
| 32   | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete  |            |     |     |
|      | Schedule N, Part II   | 32         |     | Х   |
| 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   | 33         |     | X   |
| 34   | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and   | <b>.</b> . |     | х   |
| OF - | Part V, line 1  Did the exemplation have a controlled entity within the manning of continue 510/b/(12)?   | 34         |     | X   |
|      | Did the organization have a controlled entity within the meaning of section 512(b)(13)?  If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity                                    | 35a        |     |     |
| b    | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   | 35b        |     |     |
| 36   | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?  | 335        |     |     |
| 00   | If "Yes," complete Schedule R, Part V, line 2   | 36         |     | х   |
| 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  | 37         |     | Х   |
| 38   | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?  |            |     |     |
|      |   | 38         | Х   |     |
| Pai  | Note: All Form 990 filers are required to complete Schedule O  t V Statements Regarding Other IRS Filings and Tax Compliance  |            |     |     |
|      | Check if Schedule O contains a response or note to any line in this Part V  |            |     |     |
|      |   |            | Yes | No  |
|      | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable  | _          |     |     |
|      | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable   |            |     |     |
| С    | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming  |            | 77  |     |
|      | (gambling) winnings to prize winners?   | 1c         | Х   |     |

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

|        |  |                              |            | Yes | No                |
|--------|--|------------------------------|------------|-----|-------------------|
| 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  | 2a 167                       |            |     |                   |
| b      | If at least one is reported on line 2a, did the organization file all required federal employment tax return   | าร?                          | 2b         | X   |                   |
|        | Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)  |                              |            |     |                   |
| За     | Did the organization have unrelated business gross income of \$1,000 or more during the year?  |                              | За         |     | Х                 |
| b      | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule 6  | 0                            | 3b         |     |                   |
| 4a     | At any time during the calendar year, did the organization have an interest in, or a signature or other a  | uthority over, a             |            |     |                   |
|        | financial account in a foreign country (such as a bank account, securities account, or other financial a   | ccount)?                     | 4a         |     | X                 |
| 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 Ac  | , ,                          |            |     |                   |
|        | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  |                              | 5a         |     | X                 |
|        | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction of the control |                              | 5b         |     | Х                 |
|        | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?  |                              | 5c         |     |                   |
| ьа     | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the   |                              | <b>C</b> - |     | x                 |
| h      | any contributions that were not tax deductible as charitable contributions?  If "Yes," did the organization include with every solicitation an express statement that such contributions.  |                              | 6a         |     | 1                 |
| D      |  |                              | 6b         |     |                   |
| 7      | were not tax deductible?  Organizations that may receive deductible contributions under section 170(c).  |                              | OD         |     |                   |
| '<br>а | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and serv   | vices provided to the payor? | 7a         | Х   |                   |
|        | If "Yes," did the organization notify the donor of the value of the goods or services provided?  |                              | 7b         | Х   |                   |
|        | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was   |                              |            |     |                   |
|        | to file Form 8282?   |                              | 7c         |     | Х                 |
| d      | If "Yes," indicate the number of Forms 8282 filed during the year  | 7d                           |            |     |                   |
|        | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit co   | ontract?                     | 7e         |     | Х                 |
| f      | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contra  | act?                         | 7f         |     | Х                 |
| g      | If the organization received a contribution of qualified intellectual property, did the organization file Fo   | rm 8899 as required?         | 7g         |     |                   |
| h      | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization   | tion file a Form 1098-C?     | 7h         |     |                   |
| 8      | <b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained   | by the                       |            |     |                   |
|        |  |                              | 8          |     |                   |
| 9      | Sponsoring organizations maintaining donor advised funds.  |                              | _          |     |                   |
| а      |  |                              | 9a         |     |                   |
| b      | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  |                              | 9b         |     |                   |
| 10     | Section 501(c)(7) organizations. Enter:  | 100                          |            |     |                   |
| a<br>b |  | 10a<br>10b                   |            |     |                   |
| 11     | Section 501(c)(12) organizations. Enter:   | TOD                          |            |     |                   |
|        | Gross income from members or shareholders  | 11a                          |            |     |                   |
|        | Gross income from other sources (Do not net amounts due or paid to other sources against   |                              |            |     |                   |
| -      |  | 11b                          |            |     |                   |
| 12a    | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form   |                              | 12a        |     |                   |
|        |  | 12b                          |            |     |                   |
| 13     | Section 501(c)(29) qualified nonprofit health insurance issuers.   |                              |            |     |                   |
| а      | Is the organization licensed to issue qualified health plans in more than one state?   |                              | 13a        |     |                   |
|        | <b>Note:</b> 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   | 1                            |            |     |                   |
|        |  | 13b                          |            |     |                   |
|        |  | 13c                          |            |     | v                 |
|        | Did the organization receive any payments for indoor tanning services during the tax year?   |                              | 14a        |     | X                 |
|        | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule  |                              | 14b        |     |                   |
| 15     | Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuner  |                              | 4-         |     | X                 |
|        | excess parachute payment(s) during the year?   |                              | 15         |     | $\vdash^{\Delta}$ |
| 16     | If "Yes," see instructions and file Form 4720, Schedule N.  Is the organization an educational institution subject to the section 4968 excise tax on net investment  | tincome?                     | 16         |     | Х                 |
| 10     | If "Yes," complete Form 4720, Schedule O.  | income?                      | 10         |     |                   |
|        | 11 100, Complete Form 4720, Conedule C.  |                              | Form       | 990 | (2020             |

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

|     | Check if Schedule O contains a response or note to any line in this Part VI  |           |         | $\lfloor X \rfloor$ |
|-----|--|-----------|---------|---------------------|
| Sec | tion A. Governing Body and Management  |           |         |                     |
|     |  |           | Yes     | No                  |
| 1a  | Enter the number of voting members of the governing body at the end of the tax year 1a 16  |           |         |                     |
|     | If there are material differences in voting rights among members of the governing body, or if the governing                              |           |         |                     |
|     | body delegated broad authority to an executive committee or similar committee, explain on Schedule O.                                    |           |         |                     |
| b   | Enter the number of voting members included on line 1a, above, who are independent 1b 15   |           |         |                     |
| 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?   | 2         |         | X                   |
| 3   | Did the organization delegate control over management duties customarily performed by or under the direct supervision                    |           |         |                     |
|     | of officers, directors, trustees, or key employees to a management company or other person?  | 3         |         | X                   |
| 4   | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?                         | 4         | X       |                     |
| 5   | Did the organization become aware during the year of a significant diversion of the organization's assets?                               | 5         |         | X                   |
| 6   | Did the organization have members or stockholders?   | 6         |         | Х                   |
| 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?  | 7a        |         | X                   |
| b   | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or                       |           |         |                     |
|     | persons other than the governing body?   | 7b        |         | X                   |
| 8   | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:        |           |         |                     |
| а   | The governing body?  | 8a        | X       |                     |
| b   | Each committee with authority to act on behalf of the governing body?  | 8b        | X       |                     |
| 9   | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the                     |           |         |                     |
| _   | organization's mailing address? If "Yes," provide the names and addresses on Schedule O  | 9         |         | X                   |
| Sec | tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)                         |           |         |                     |
|     |  |           | Yes     | No                  |
|     | Did the organization have local chapters, branches, or affiliates?   | 10a       | X       |                     |
| b   | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,               |           | 7.7     |                     |
|     | and branches to ensure their operations are consistent with the organization's exempt purposes?  | 10b       | X       |                     |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?              | 11a       | Х       |                     |
| b   | Describe in Schedule O the process, if any, used by the organization to review this Form 990.  |           | 77      |                     |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13  | 12a       | X       |                     |
| b   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?      | 12b       | Х       |                     |
| С   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe                       |           | 37      |                     |
|     | in Schedule O how this was done  | 12c       | X       |                     |
| 13  | Did the organization have a written whistleblower policy?  | 13        | X       |                     |
| 14  | Did the organization have a written document retention and destruction policy?   | 14        | Λ       |                     |
| 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?  | 45-       | Х       |                     |
|     | The organization's CEO, Executive Director, or top management official   | 15a       | 27      | Х                   |
| D   | Other officers or key employees of the organization  If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). | 15b       |         | 21                  |
| 160 | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a                    |           |         |                     |
| iva |  | 16a       |         | Х                   |
| h   | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation             | IUa       |         |                     |
| D   | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's                           |           |         |                     |
|     |  | 16b       |         |                     |
| Sec | exempt status with respect to such arrangements?   | 100       |         |                     |
| 17  | List the states with which a copy of this Form 990 is required to be filed ►MA   |           |         |                     |
| 18  | Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3           | s only    | ) avail | able                |
|     | for public inspection. Indicate how you made these available. Check all that apply.  | , 5 51 my | ,       |                     |
|     | Own website Another's website X Upon request Other (explain on Schedule O)   |           |         |                     |
| 19  | Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, an           | d finar   | ncial   |                     |
|     | 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                           |           |         |                     |
|     | CELINE MUKASINE, CFO - (617) 695-1688  |           |         |                     |
|     | 2 BOYLSTON STREET, SUITE 300, BOSTON, MA 02116   |           |         |                     |

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# Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

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

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See 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.

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

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

| (A)                                  | (B)           | l   |                       | ((           |              | npo.                         | - Iou    | (D)             | (E)             | (F)                    |
|--------------------------------------|---------------|---|-----------------------|--------------|--------------|------------------------------|----------|-----------------|-----------------|------------------------|
| Name and title                       | Average       |   |                       | Pos          |              | 1                            |          | Reportable      | Reportable      | Estimated              |
| Name and title                       | hours per     | (do not check more than one box, unless person is both an |                       | compensation | compensation | amount of                    |          |                 |                 |                        |
|                                      | week          |   |                       |              |              | r/trus                       |          | from            | from related    | other                  |
|                                      | (list any     | ctor  |                       |              |              |                              |          | the             | organizations   | compensation           |
|                                      | hours for     | Individual trustee or director                            |                       |              |              | peq                          |          | organization    | (W-2/1099-MISC) | from the               |
|                                      | related       | stee o  | ustee                 |              |              | ensa                         |          | (W-2/1099-MISC) |                 | organization           |
|                                      | organizations | al trus   | nal tr                |              | loyee        | comp                         |          |                 |                 | and related            |
|                                      | below         | ividu   | Institutional trustee | Officer      | Key employee | Highest compensated employee | Former   |                 |                 | organizations          |
| 71.                                  | line)         | 트   | lus                   | ₽            | Ke           | High                         | For      |                 |                 | _                      |
| (1) JEFFREY THIELMAN                 | 40.00         | \<br>\  |                       | 37           |              |                              |          | 201 664         | 0               | 1 270                  |
| PRESIDENT, CEO, & TREASURER          | 40 00         | Х   |                       | X            |              |                              |          | 201,664.        | 0.              | 1,279.                 |
| (2) RITA MCDONOUGH                   | 40.00         |   |                       | 77           |              |                              |          | 154 000         | 0               | 10 674                 |
| CFO (LEFT DEC 2020)                  | 40.00         |   |                       | Х            |              |                              |          | 154,820.        | 0.              | 10,674.                |
| (3) ALEXANDRA WEBER                  | 40.00         |   |                       |              |              | v                            |          | 122 000         | 0               | 22 261                 |
| CHIEF PROGRAM OFFICER                | 40.00         |   |                       |              |              | Х                            |          | 132,080.        | 0.              | 22,361.                |
| (4) CHIARA ST PIERRE                 | 40.00         |   |                       |              |              | ,,                           |          | 106 706         | 0               | 12 160                 |
| MANAGING ATTORNEY                    | 40.00         |   |                       |              |              | Х                            |          | 106,726.        | 0.              | 13,169.                |
| (5) LESLIE FINN                      | 40.00         |   |                       |              |              | 7.7                          |          | 117 225         | 0               | F 0.75                 |
| CHIEF DEVELOPMENT OFFICER            | 40.00         |   |                       |              |              | Х                            |          | 117,225.        | 0.              | 5,975.                 |
| (6) CELINE MUKASINE                  | 40.00         |   |                       | \<br>\<br>** |              |                              |          |                 | 0               | _                      |
| CFO (EFFECTIVE MARCH 2021)           | 8.00          | _   |                       | Х            |              |                              |          | 0.              | 0.              | 0.                     |
| (7) ZOLTAN CSIMMA                    | 8.00          | ,,  |                       | ,,           |              |                              |          |                 | 0               | _                      |
| CHAIR (LEFT DEC 2021)                | 2.00          | Х   |                       | Х            |              |                              |          | 0.              | 0.              | 0.                     |
| (8) AVAK KAHVEJIAN                   | 2.00          | Ι,,   |                       |              |              |                              |          |                 | 0               | _                      |
| BOARD MEMBER                         | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (9) BOPHA MALONE                     | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0                      |
| BOARD MEMBER                         | 2.00          | ^   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (10) CHRISTINA BAI                   | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | ^                      |
| BOARD MEMBER                         | 2 00          | ^   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (11) DEBORAH SHUFRIN                 | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | ^                      |
| BOARD MEMBER                         | 2.00          | ^   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (12) FREDERICK MILLHAM, M.D.         | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER                         | 2.00          | ^   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (13) GINGER GREGORY                  | 2.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER                         | 2 00          | ^   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| (14) NIA TATSIS                      | 2.00          | X   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER                         | 2.00          | ^   | <u> </u>              | _            | <u> </u>     | -                            | _        | 0.              | 0.              | <u> </u>               |
| (15) SHARI LOESSBERG                 | 4.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER (16) THEO MELAS-KYRIAZI | 2.00          | ^   | _                     | $\vdash$     | $\vdash$     | $\vdash$                     | $\vdash$ | 0.              | 0.              | <u> </u>               |
|                                      | 4.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER                         | 2.00          | ^   | _                     | _            | $\vdash$     | $\vdash$                     |          | 0.              | 0.              | <u> </u>               |
| (17) TUAN HA-NGOC                    | 4.00          | Х   |                       |              |              |                              |          | 0.              | 0.              | 0.                     |
| BOARD MEMBER<br>032007 12-23-20      |               | Δ   |                       |              | <u> </u>     |                              |          | 1 0.            | 0.              | Form <b>990</b> (2020) |

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| Part VII Section A. Officers, Directors, To (A)  | (B)                  | <u> </u>           |                       | , <u></u>    |               | <u> </u>                     |          | (D)                      | (E)                 | $\neg$            |             | (F)        |          |
|--|----------------------|--------------------|-----------------------|--------------|---------------|------------------------------|----------|--------------------------|---------------------|-------------------|-------------|------------|----------|
| Name and title   | Average              | Position           |                       |              |               |                              |          | Reportable               | Reportable          |                   | Fs          | timate     | ed       |
| Name and the   | hours per            | box                | , unle                | heck ss pe   | rson          | is bot                       | th an    | compensation             | compensation        |                   |             | nount      |          |
|  | week                 |                    | cer ar                | nd a d       | irecto        | or/trus                      | stee)    | from                     | from related        |                   |             | other      |          |
|  | (list any            | director           |                       |              |               |                              |          | the                      | organizations       |                   |             | pensa      |          |
|  | hours for related    | 5                  | e e                   |              |               | ated                         |          | organization             | (W-2/1099-MISC      | , I               |             | om th      |          |
|  | organizations        | ustee              | trust                 |              | 9             | ubeus                        |          | (W-2/1099-MISC)          |                     |                   | organizatio |            |          |
|  | below                | lual tr            | tional                | ١. ا         | ploye         | st con                       |          |                          |                     |                   |             | anizati    |          |
|  | line)                | Individual trustee | Institutional trustee | Office r     | Key employee  | Highest compensated employee | Forme    |                          |                     |                   | 3-          |            |          |
| (18) WILLIAM KRAUSE  | 2.00                 |                    |                       |              |               |                              |          |                          |                     | $\neg$            |             |            |          |
| BOARD MEMBER   |                      | Х                  |                       |              |               |                              |          | 0.                       | (                   | ).                |             |            | 0.       |
| (19) LIBBY MAY   | 2.00                 |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
| BOARD MEMBER   |                      | Х                  |                       |              |               |                              |          | 0.                       | (                   | ) .               |             |            | 0.       |
| (20) SAM EPEE-BOUNYA   | 2.00                 |                    |                       |              |               |                              |          |                          |                     |                   |             |            | _        |
| BOARD MEMBER   |                      | X                  |                       |              |               |                              |          | 0.                       | (                   | ) •               |             |            | 0.       |
| (21) DAN KOH   | 2.00                 | ١                  |                       |              |               |                              |          |                          | ,                   |                   |             |            | •        |
| BOARD MEMBER (LEFT MARCH 2021)   |                      | Х                  |                       |              |               |                              |          | 0.                       | (                   | ) •               |             |            | 0.       |
| (22) TARA CHYNOWETH  | 2.00                 | ١,,                |                       |              |               |                              |          |                          | ,                   | $\backslash \mid$ |             |            | ^        |
| BOARD MEMBER (LEFT NOV 2021)   |                      | Х                  |                       |              |               | -                            | _        | 0.                       | ·                   | ).                |             |            | 0.       |
|  |                      | -                  |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  | +                    |                    |                       |              |               |                              |          |                          |                     | +                 |             |            |          |
|  |                      | 1                  |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     | $\dashv$          |             |            |          |
|  |                      | 1                  |                       |              |               |                              | И        | /                        |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     | 1                 |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
| 1b Subtotal  |                      |                    |                       |              | · · · · ·     |                              |          | 712,515.                 |                     | ) •               | 5           | 3,4        | 58.      |
| c Total from continuation sheets to Part   |                      |                    |                       |              |               |                              |          | 0.                       |                     | ) •               |             |            | 0.       |
| d Total (add lines 1b and 1c)  |                      |                    |                       |              |               |                              |          | 712,515.                 | (                   | ) •               | 5           | <u>3,4</u> | 58.      |
| 2 Total number of individuals (including but   | ıt not limited to th | nose               | liste                 | ed al        | bov           | e) w                         | ho r     | eceived more than \$100  | 0,000 of reportable |                   |             |            | _        |
| compensation from the organization   |                      |                    |                       |              | 7             |                              |          |                          |                     |                   |             |            | 5        |
| 6 Bill I I I I I   |                      |                    |                       |              |               |                              |          |                          |                     |                   |             | Yes        | No       |
| 3 Did the organization list any <b>former</b> offic                                      |                      | 1                  |                       |              |               |                              |          |                          |                     |                   |             |            | х        |
| line 1a? If "Yes," complete Schedule J fo  |                      |                    |                       |              |               |                              |          | har companation from     |                     | ··                | 3           |            |          |
| 4 For any individual listed on line 1a, is the and related organizations greater than \$ |                      |                    |                       |              |               |                              |          |                          |                     |                   | 4           | Х          |          |
| 5 Did any person listed on line 1a receive   |                      |                    |                       |              |               |                              |          |                          |                     | ··                | _           |            |          |
| rendered to the organization? If "Yes," c  | •                    |                    |                       |              | •             |                              |          | ca organization of marv  |                     |                   | 5           |            | х        |
| Section B. Independent Contractors   | p.o.c                |                    | 0. 0.                 | <sub>[</sub> | <i>p</i> 0. c |                              |          |                          |                     | ··                |             |            | <u> </u> |
| 1 Complete this table for your five highest  | compensated in       | dep                | ende                  | ent c        | onti          | racto                        | ors t    | that received more than  | \$100,000 of compe  | ensa              | tion f      | rom        |          |
| the organization. Report compensation  | for the calendar y   | ear                | endi                  | ng v         | vith          | or w                         | /ithi    | n the organization's tax | year.               |                   |             |            |          |
| (A)  |                      |                    | ~                     | _            |               |                              |          | (B)                      |                     | _                 | (C          |            |          |
| Name and busine  | ess address          | N                  | INC                   | <u> </u>     |               |                              | $\dashv$ | Description of s         | services            | <u></u>           | mpe         | nsatio     | n        |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              | _        |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     |                   |             |            |          |
| 2 Total number of independent contractor   | s (including but r   | not li             | mite                  | d to         | tho           | se li                        | ster     | above) who received m    | nore than           |                   |             |            |          |
| \$100,000 of compensation from the org   |                      |                    |                       |              |               | 0                            |          |                          |                     |                   |             |            |          |
|  |                      |                    |                       |              |               |                              |          |                          |                     | F                 | orm         | 990 (      | 2020)    |

032008 12-23-20

Form 990 (2020) INC.

Part VIII Statement of Revenue

| Pa  | rt v | 1111   |  |                    |                      |                          |           |                    |
|---|------|--------|--|--------------------|----------------------|--------------------------|-----------|--------------------|
|   |      |        | Check if Schedule O contains a response of                             | or note to any lin |                      |                          | (C)       |                    |
|   |      |        |  |                    | (A)<br>Total revenue | (B)<br>Related or exempt | Unrelated | Revenue excluded   |
|   |      |        |  |                    | Total revenue        | function revenue         |           | from tax under     |
|   |      |        |  |                    |                      |                          |           | sections 512 - 514 |
| nts<br>nts  | 1 :  | а      | Federated campaigns 1a   |                    |                      |                          |           |                    |
| ara<br>oui  |      | b      | Membership dues 1b   |                    |                      |                          |           |                    |
| s, (<br>Am  |      | С      | Fundraising events 1c  |                    |                      |                          |           |                    |
| 3ift<br>Iar,  |      |        | Related organizations 1d   |                    |                      |                          |           |                    |
| s, (<br>imi   |      |        |  | 919,032.           |                      |                          |           |                    |
| Contributions, Gifts, Grants<br>  and Other Similar Amounts |      | f      | All other contributions, gifts, grants, and                            |                    |                      |                          |           |                    |
| but   |      |        |  | 510,071.           |                      |                          |           |                    |
| jĘ.   |      | a      | Noncash contributions included in lines 1a-1f 1g \$                    | 46,920.            |                      |                          |           |                    |
| Sol   |      | _      | Total. Add lines 1a-1f   |                    | 7,529,103.           |                          |           |                    |
| _   |      | _      |  | Business Code      | , ,                  |                          |           |                    |
| o   | 2    | 2      | PROGRAM FEES   | 541900             | 272,470.             | 272,470.                 |           |                    |
| vic   | _    | a<br>b | CONTRACTED SERVICES  | 541900             | 63,242.              | 63,242.                  |           |                    |
| Ser   |      | -      | - DERIVIOLE  | 311300             | 03/2121              | 4                        |           |                    |
| m<br>Ver  |      | C      |  |                    |                      |                          |           |                    |
| gra<br>Re   | '    | d      |  |                    |                      |                          |           |                    |
| Program Service<br>Revenue                                  | '    | e      | All III  |                    |                      |                          |           |                    |
| _   |      |        | All other program service revenue                                      |                    | 335,712.             |                          |           |                    |
|   |      | g      | Total. Add lines 2a-2f   |                    | 333,112.             |                          |           |                    |
|   | 3    |        | Investment income (including dividends, interes                        | •                  | 117,793.             |                          |           | 117,793.           |
|   |      |        | other similar amounts)   |                    | 111,155.             |                          |           | 111,155            |
|   | 4    |        | Income from investment of tax-exempt bond pr                           |                    |                      |                          |           |                    |
|   | 5    |        | Royalties (i) Real   | (ii) Personal      |                      |                          |           |                    |
|   |      | _      |  | (ii) i cisoriai    |                      |                          |           |                    |
|   |      |        | Gross rents 6a   |                    |                      |                          |           |                    |
|   |      |        | Less: rental expenses 6b  Rental income or (loss) 6c                   |                    |                      |                          |           |                    |
|   |      |        | Niet werstellinge was an (least)                                       |                    |                      |                          |           |                    |
|   |      |        | Net rental income or (loss)  Gross amount from sales of (i) Securities | (ii) Other         |                      |                          |           |                    |
|   | ′    | а      | assets other than inventory 7a 282,780.                                | (ii) Other         |                      |                          |           |                    |
|   |      | h      | Less: cost or other basis  |                    |                      |                          |           |                    |
| <u>e</u>  |      | D      | and sales expenses   |                    |                      |                          |           |                    |
| enr   |      | _      | Gain or (loss) 7c 123, 314.  |                    |                      |                          |           |                    |
| Revenue   |      | 4      | Net gain or (loss)   | <b>.</b>           | 123,314.             |                          |           | 123,314.           |
| er  |      |        | Gross income from fundraising events (not                              |                    | 220,021              |                          |           | 223,3210           |
| 당   | 0    | u      | including \$ of  |                    |                      |                          |           |                    |
|   |      |        | contributions reported on line 1c). See                                |                    |                      |                          |           |                    |
|   |      |        | Part IV, line 18 8a  |                    |                      |                          |           |                    |
|   |      | h      | Less: direct expenses 8b   |                    |                      |                          |           |                    |
|   |      |        |  | <b>&gt;</b>        |                      |                          |           |                    |
|   |      |        | Gross income from gaming activities. See                               |                    |                      |                          |           |                    |
|   |      | _      | Part IV, line 19 9a  |                    |                      |                          |           |                    |
|   |      | b      | Less: direct expenses 9b   |                    |                      |                          |           |                    |
|   |      |        | Al 12  |                    |                      |                          |           |                    |
|   |      |        | Gross sales of inventory, less returns                                 |                    |                      |                          |           |                    |
|   |      |        | and allowances 10a   |                    |                      |                          |           |                    |
|   |      | b      | Less: cost of goods sold 10b   |                    |                      |                          |           |                    |
|   |      |        | Net income or (loss) from sales of inventory                           | <b>&gt;</b>        |                      |                          |           |                    |
| s   |      |        |  | Business Code      |                      |                          |           |                    |
| Miscellaneous<br>Revenue                                    | 11   | а      |  |                    |                      |                          |           |                    |
| ane   |      | b      |  |                    |                      |                          |           |                    |
| e sel   |      | С      |  |                    |                      |                          |           |                    |
| Mis   |      | d      | All other revenue  |                    |                      |                          |           |                    |
|   |      | е      | Total. Add lines 11a-11d   |                    | 0 105 000            | 225 512                  |           | 044 45=            |
|   | 12   |        | Total revenue. See instructions  |                    | 8,105,922.           | 335,712.                 | 0.        | 241,107.           |

#### Part IX Statement of Functional Expenses

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

| D- | Check if Schedule O contains a respon   | nse or note to any line in (A) | this Part IX(B)             | (C)                             | (D)                  |
|----|---|--------------------------------|-----------------------------|---------------------------------|----------------------|
|    | not include amounts reported on lines 6b,<br>8b, 9b, and 10b of Part VIII.                            | Total expenses                 | Program service<br>expenses | Management and general expenses | Fundraising expenses |
| 1  | Grants and other assistance to domestic organizations   |                                |                             |                                 |                      |
|    | and domestic governments. See Part IV, line 21  |                                |                             |                                 |                      |
| 2  | Grants and other assistance to domestic   | 617 277                        | 617 277                     |                                 |                      |
| _  | individuals. See Part IV, line 22   | 617,377.                       | 617,377.                    |                                 |                      |
| 3  | Grants and other assistance to foreign  |                                |                             |                                 |                      |
|    | organizations, foreign governments, and foreign   |                                |                             |                                 |                      |
|    | individuals. See Part IV, lines 15 and 16   |                                |                             |                                 |                      |
| 4  | Benefits paid to or for members   |                                |                             |                                 |                      |
| 5  | Compensation of current officers, directors,  | 389,505.                       | 116,852.                    | 202,375.                        | 70,278               |
| _  | trustees, and key employees   | 309,303.                       | 110,032.                    | 202,313.                        | 10,210               |
| 6  | Compensation not included above to disqualified   |                                |                             |                                 |                      |
|    | persons (as defined under section 4958(f)(1)) and   |                                |                             |                                 |                      |
| _  | persons described in section 4958(c)(3)(B)  | 2 200 262                      | 2 426 760                   | 610 106                         | 25/ /17              |
| 7  | Other salaries and wages  | 3,399,363.                     | 2,426,760.                  | 618,186.                        | 354,417              |
| 8  | Pension plan accruals and contributions (include  |                                |                             |                                 |                      |
| _  | section 401(k) and 403(b) employer contributions)   | 449,187.                       | 308,084.                    | 00 252                          | E1 7E^               |
| 9  | Other employee benefits   |                                |                             | 89,353.                         | 51,750               |
| 10 | Payroll taxes   | 264,684.                       | 177,167.                    | 57,313.                         | 30,204               |
| 11 | Fees for services (nonemployees):   |                                |                             |                                 |                      |
| а  | •   | 70 400                         |                             | 70 400                          |                      |
| b  | Legal   | 72,490.                        |                             | 72,490.                         |                      |
| С  | •   | 43,203.                        | 20 500                      | 43,203.                         |                      |
| d  | Lobbying  | 38,500.                        | 38,500.                     |                                 | 20 450               |
| е  | ,   | 39,450.                        |                             |                                 | 39,450               |
| f  | Investment management fees  |                                |                             |                                 |                      |
| g  | ,   | 001 121                        | F1 F00                      | 010 655                         | 06 024               |
|    | column (A) amount, list line 11g expenses on Sch O.)  | 291,131.                       | 51,520.                     | 212,677.                        | 26,934               |
| 12 | Advertising and promotion   | 1,693.                         | 564.                        | 105.                            | 1,024                |
| 13 | Office expenses   | 81,152.                        | 71,635.                     | 2,506.                          | 7,011                |
| 14 | Information technology  |                                |                             |                                 |                      |
| 15 | Royalties   | 500 005                        | 116 006                     | 50 444                          | 10 160               |
| 16 | Occupancy   | 539,307.                       | 446,036.                    | 50,111.                         | 43,160               |
| 17 | Travel  | 30,831.                        | 16,981.                     | 12,420.                         | 1,430                |
| 18 | Payments of travel or entertainment expenses  |                                |                             |                                 |                      |
|    | for any federal, state, or local public officials   |                                |                             |                                 |                      |
| 19 | Conferences, conventions, and meetings  |                                |                             |                                 |                      |
| 20 | Interest  |                                |                             |                                 |                      |
| 21 | Payments to affiliates  | 226 2==                        | 011 = 05                    |                                 | 26 12 2              |
| 22 | Depreciation, depletion, and amortization   | 326,275.                       | 244,706.                    | 55,467.                         | 26,102               |
| 23 | Insurance   | 49,195.                        | 855.                        | 48,340.                         |                      |
| 24 | Other expenses. Itemize expenses not covered  |                                |                             |                                 |                      |
|    | above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) |                                |                             |                                 |                      |
|    | amount, list line 24e expenses on Schedule 0.)  | 4.5= ===                       | 4                           | 400 == 1                        |                      |
| а  | RECRUITMENT   | 125,772.                       | 1,996.                      | 123,776.                        |                      |
| b  | PROGRAM SUPPLIES  | 122,118.                       | 93,956.                     | 25,727.                         | 2,435                |
| С  | SPECIAL EVENTS  | 109,356.                       |                             |                                 | 109,356              |
| d  | SERVICE CHARGES   | 87,755.                        | 3,258.                      | 71,323.                         | 13,174               |
| е  | All other expenses  | 126,947.                       | 89,924.                     | 19,148.                         | 17,875               |
| 25 | Total functional expenses. Add lines 1 through 24e  | 7,205,291.                     | 4,706,171.                  | 1,704,520.                      | 794,600              |
| 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 if following SOP 98-2 (ASC 958-720)  |                                |                             |                                 |                      |

Form **990** (2020)

Form 990 (2020)

Part X | Balance Sheet

| Pa                          | rt X | Balance Sheet   |          |                       |                                 |        |                           |
|-----------------------------|------|---|----------|-----------------------|---------------------------------|--------|---------------------------|
|                             |      | Check if Schedule O contains a response or not        | e to an  | y line in this Part X |                                 |        |                           |
|                             |      |   |          |                       | <b>(A)</b><br>Beginning of year |        | <b>(B)</b><br>End of year |
|                             | 1    | Cash - non-interest-bearing                           |          |                       | 906,611.                        | 1      | 680,095.                  |
|                             | 2    | Savings and temporary cash investments                |          |                       |                                 | 2      |                           |
|                             | 3    | Pledges and grants receivable, net                    | 723,511. | 3                     | 1,301,245                       |        |                           |
|                             | 4    | Accounts receivable, net                              |          | 54,101.               | 4                               | 49,313 |                           |
|                             | 5    | Loans and other receivables from any current or       |          |                       |                                 |        |                           |
|                             |      | trustee, key employee, creator or founder, subst      | antial ( | contributor, or 35%   |                                 |        |                           |
|                             |      | controlled entity or family member of any of thes     | ons      |                       | 5                               |        |                           |
|                             | 6    | Loans and other receivables from other disqualit      | ied pe   | rsons (as defined     |                                 |        |                           |
|                             |      | under section 4958(f)(1)), and persons described      | l in sed | ction 4958(c)(3)(B)   |                                 | 6      |                           |
| ţ                           | 7    | Notes and loans receivable, net                       |          |                       |                                 | 7      |                           |
| Assets                      | 8    | Inventories for sale or use                           |          |                       |                                 | 8      |                           |
| Ÿ                           | 9    |   |          |                       | 118,178.                        | 9      | 170,146                   |
|                             | 10a  | Land, buildings, and equipment: cost or other         |          |                       |                                 |        |                           |
|                             |      | basis. Complete Part VI of Schedule D                 | 10a      | 3,035,106.            |                                 |        |                           |
|                             | b    | Less: accumulated depreciation                        | 10b      | 1,296,143.            | 1,588,536.                      | 10c    | 1,738,963<br>8,219,112    |
|                             | 11   | Investments - publicly traded securities              |          |                       | 7,172,529.                      | 11     | 8,219,112                 |
|                             | 12   | Investments - other securities. See Part IV, line 1   |          |                       |                                 | 12     |                           |
|                             | 13   | Investments - program-related. See Part IV, line      |          |                       |                                 | 13     |                           |
|                             | 14   | Intangible assets                                     |          | 14                    |                                 |        |                           |
|                             | 15   | Other assets. See Part IV, line 11                    |          |                       |                                 | 15     |                           |
|                             | 16   | Total assets. Add lines 1 through 15 (must equa       |          |                       | 10,563,466.                     | 16     | 12,158,874                |
|                             | 17   | Accounts payable and accrued expenses                 |          |                       | 407,369.                        | 17     | 308,899                   |
|                             | 18   | Grants payable  |          |                       |                                 | 18     |                           |
|                             | 19   | Deferred revenue                                      |          |                       | 57,924.                         | 19     | 55,197                    |
|                             | 20   | Tax-exempt bond liabilities                           |          |                       |                                 | 20     |                           |
|                             | 21   | Escrow or custodial account liability. Complete F     |          |                       |                                 | 21     |                           |
| S                           | 22   | Loans and other payables to any current or form       | er offic | cer, director,        |                                 |        |                           |
| Liabilities                 |      | trustee, key employee, creator or founder, subst      | antial ( | contributor, or 35%   |                                 |        |                           |
| api                         |      | controlled entity or family member of any of thes     | e pers   | ons                   |                                 | 22     |                           |
|                             | 23   | Secured mortgages and notes payable to unrela         | ted thi  | rd parties            |                                 | 23     |                           |
|                             | 24   | Unsecured notes and loans payable to unrelated        | third    | parties               |                                 | 24     |                           |
|                             | 25   | Other liabilities (including federal income tax, page | /ables   | to related third      |                                 |        |                           |
|                             |      | parties, and other liabilities not included on lines  | 17-24    | . Complete Part X     |                                 |        |                           |
|                             |      | of Schedule D   |          |                       | 862,110.                        | 25     | 743,773.                  |
|                             | 26   | Total liabilities. Add lines 17 through 25            |          |                       | 1,327,403.                      | 26     | 1,107,869                 |
| S                           |      | Organizations that follow FASB ASC 958, che           | ck her   | e ▶ X                 |                                 |        |                           |
| č                           |      | and complete lines 27, 28, 32, and 33.                |          |                       |                                 |        |                           |
| alar                        | 27   | Net assets without donor restrictions                 |          |                       | 8,910,636.                      | 27     | 10,407,510.               |
| Ä                           | 28   | Net assets with donor restrictions                    |          |                       | 325,427.                        | 28     | 643,495.                  |
| Ĕ                           |      | Organizations that do not follow FASB ASC 99          | 58, ch   | eck here 🕨 📖          |                                 |        |                           |
| F                           |      | and complete lines 29 through 33.                     |          |                       |                                 |        |                           |
| ts 0                        | 29   | Capital stock or trust principal, or current funds    |          |                       |                                 | 29     |                           |
| Net Assets or Fund Balances | 30   | Paid-in or capital surplus, or land, building, or eq  |          |                       |                                 | 30     |                           |
| ţ                           | 31   | Retained earnings, endowment, accumulated in          |          |                       | 0.000.000                       | 31     | 44 054 055                |
| Š                           | 32   | Total net assets or fund balances                     |          |                       | 9,236,063.                      | 32     | 11,051,005.               |
|                             | 33   | Total liabilities and net assets/fund balances        |          |                       | 10,563,466.                     | 33     | 12,158,874                |

| Pa | rt XI Reconciliation of Net Assets  |         |         |     |          |          |  |
|----|---|---------|---------|-----|----------|----------|--|
|    | Check if Schedule O contains a response or note to any line in this Part XI   |         | <u></u> |     |          |          |  |
|    |   |         |         |     |          |          |  |
| 1  | Total revenue (must equal Part VIII, column (A), line 12)   | 1       |         | ,10 |          |          |  |
| 2  | Total expenses (must equal Part IX, column (A), line 25)  | 2       | 7       | ,20 |          |          |  |
| 3  | Revenue less expenses. Subtract line 2 from line 1  | 3       |         |     |          | 31.      |  |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                                       | 4       | 9       |     |          | 63.      |  |
| 5  | Net unrealized gains (losses) on investments  | 5       |         | 91  | 4,3      | 11.      |  |
| 6  | Donated services and use of facilities  | 6       |         |     |          |          |  |
| 7  | Investment expenses   | 7       |         |     |          |          |  |
| 8  | Prior period adjustments  | 8       |         |     |          |          |  |
| 9  | Other changes in net assets or fund balances (explain on Schedule O)  | 9       |         |     |          | 0.       |  |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32,                              |         |         |     |          |          |  |
|    | column (B))   | 10      | 11      | ,05 | 1,0      | 05.      |  |
| Pa | rt XII Financial Statements and Reporting   |         |         |     |          |          |  |
|    | Check if Schedule O contains a response or note to any line in this Part XII  |         |         |     |          | X        |  |
|    |   |         |         |     | Yes      | No       |  |
| 1  | Accounting method used to prepare the Form 990: Cash X Accrual Other  |         |         |     |          |          |  |
|    | If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule                  |         |         |     |          |          |  |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant?                                 |         |         | 2a  |          | X        |  |
|    | If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed                 | d on a  |         |     |          |          |  |
|    | separate basis, consolidated basis, or both:  |         |         |     |          |          |  |
|    | Separate basis Consolidated basis Both consolidated and separate basis  |         |         |     |          |          |  |
| b  | Were the organization's financial statements audited by an independent accountant?  |         |         | 2b  | _X       |          |  |
|    | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separat                 | e basis | 3,      |     |          |          |  |
|    | consolidated basis, or both:  |         |         |     |          |          |  |
|    | Separate basis Consolidated basis Both consolidated and separate basis  |         |         |     |          |          |  |
| С  | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the              | e audit | t,      |     |          |          |  |
|    | review, or compilation of its financial statements and selection of an independent accountant?                                  |         |         | 2c  | <u> </u> | <u> </u> |  |
|    | If the organization changed either its oversight process or selection process during the tax year, explain on Scl               | nedule  | Ο.      |     |          |          |  |
| За | 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?   |         |         | За  | Х        |          |  |
| b  | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required           | ired au | ıdit    |     |          |          |  |
|    | or audits, explain why on Schedule O and describe any steps taken to undergo such audits  |         |         | 3b  | X        |          |  |

#### **SCHEDULE A**

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

### Public Charity Status and Public Support

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

➤ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for instructions and the latest information. INTERNATIONAL INSTITUTE OF NEW ENGLAND

OMB No. 1545-0047

Employer identification number

Open to Public Inspection

Name of the organization INC. 04-2104325 Reason for Public Charity Status. (All organizations must complete this part.) See instructions. Part I The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.) 1 A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). 2 A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).) 3 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.) 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 A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) 11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g. Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B. Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C. 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. 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. Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization. f Enter the number of supported organizations Provide the following information about the supported organization(s). (iv) Is the organization listed (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other in your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) Yes above (see instructions))

Total

#### Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) Part II

(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.)

| Sec  | ction A. Public Support                      |                       |                     |                      |                     |                                       |             |
|------|--|-----------------------|---------------------|----------------------|---------------------|---------------------------------------|-------------|
| Cale | ndar year (or fiscal year beginning in)      | (a) 2016              | <b>(b)</b> 2017     | (c) 2018             | (d) 2019            | (e) 2020                              | (f) Total   |
| 1    | Gifts, grants, contributions, and            |                       |                     |                      |                     |                                       |             |
|      | membership fees received. (Do not            |                       |                     |                      |                     |                                       |             |
|      | include any "unusual grants.")               | 4862881.              | 4970380.            | 5937805.             | 6483372.            | 7529103.                              | 29783541.   |
| 2    | Tax revenues levied for the organ-           |                       |                     |                      |                     |                                       |             |
|      | ization's benefit and either paid to         |                       |                     |                      |                     |                                       |             |
|      | or expended on its behalf                    |                       |                     |                      |                     |                                       |             |
| 3    | The value of services or facilities          |                       |                     |                      |                     |                                       |             |
|      | furnished by a governmental unit to          |                       |                     |                      |                     |                                       |             |
|      | the organization without charge              |                       |                     |                      |                     |                                       |             |
| 4    | Total. Add lines 1 through 3                 | 4862881.              | 4970380.            | 5937805.             | 6483372.            | 7529103.                              | 29783541.   |
|      | The portion of total contributions           |                       |                     |                      |                     |                                       |             |
|      | by each person (other than a                 |                       |                     |                      |                     |                                       |             |
|      | governmental unit or publicly                |                       |                     |                      |                     |                                       |             |
|      | supported organization) included             |                       |                     |                      | 1                   |                                       |             |
|      | on line 1 that exceeds 2% of the             |                       |                     |                      |                     |                                       |             |
|      | amount shown on line 11,                     |                       |                     |                      |                     |                                       |             |
|      | column (f)                                   |                       |                     |                      |                     |                                       |             |
| 6    | Public support. Subtract line 5 from line 4. |                       |                     |                      |                     |                                       | 29783541.   |
|      | tion B. Total Support                        |                       |                     |                      |                     |                                       |             |
| Cale | ndar year (or fiscal year beginning in) 🕨    | (a) 2016              | <b>(b)</b> 2017     | (c) 2018             | (d) 2019            | (e) 2020                              | (f) Total   |
| 7    | Amounts from line 4                          | 4862881.              | 4970380.            | 5937805.             | 6483372.            | 7529103.                              | 29783541.   |
| 8    | Gross income from interest,                  |                       |                     |                      |                     |                                       |             |
|      | dividends, payments received on              |                       |                     |                      |                     |                                       |             |
|      | securities loans, rents, royalties,          |                       |                     |                      |                     |                                       |             |
|      | and income from similar sources              | 155,701.              | 163,813.            | 166,086.             | 136,419.            | 117,793.                              | 739,812.    |
| 9    | Net income from unrelated business           |                       |                     |                      |                     |                                       |             |
|      | activities, whether or not the               |                       |                     |                      |                     |                                       |             |
|      | business is regularly carried on             |                       |                     |                      |                     |                                       |             |
| 10   | Other income. Do not include gain            |                       |                     |                      |                     |                                       |             |
|      | or loss from the sale of capital             |                       |                     |                      |                     |                                       |             |
|      | assets (Explain in Part VI.)                 | 8,754.                | 24,575.             |                      |                     |                                       | 33,329.     |
| 11   | <b>Total support.</b> Add lines 7 through 10 |                       |                     |                      |                     |                                       | 30556682.   |
| 12   | Gross receipts from related activities,      | etc. (see instruction | ons)                |                      |                     | 12 1                                  | ,242,342.   |
| 13   | First 5 years. If the Form 990 is for the    | ne organization's fi  | rst, second, third, | fourth, or fifth tax | year as a section 5 | 501(c)(3)                             |             |
| _    | organization, check this box and stop        |                       |                     |                      |                     |                                       | <b>&gt;</b> |
|      | ction C. Computation of Publ                 |                       |                     |                      |                     | · · · · · · · · · · · · · · · · · · · | 00 40       |
| 14   | 11 1 3 1                                     |                       |                     |                      |                     | 14                                    | 97.47 %     |
| 15   | Public support percentage from 2019          |                       |                     |                      |                     | 15                                    | 96.87 %     |
| 16a  | 33 1/3% support test - 2020. If the o        |                       |                     |                      |                     |                                       |             |
|      | stop here. The organization qualifies        |                       |                     |                      |                     |                                       |             |
| b    | 33 1/3% support test - 2019. If the c        |                       |                     |                      |                     |                                       |             |
|      | and <b>stop here.</b> The organization qual  |                       |                     |                      |                     |                                       |             |
| 17a  | 10% -facts-and-circumstances tes             |                       |                     |                      |                     |                                       |             |
|      | and if the organization meets the fact       |                       |                     | =                    | •                   | VI how the organiz                    | ation       |
|      | meets the facts-and-circumstances to         |                       |                     | *                    | -                   |                                       |             |
| b    | 10% -facts-and-circumstances tes             | ū                     |                     |                      |                     | •                                     | 10% or      |
|      | more, and if the organization meets the      |                       | ·                   |                      | •                   |                                       | <b>⊾</b> □  |
| 40   | organization meets the facts-and-circ        |                       |                     |                      |                     |                                       |             |
| 18   | Private foundation. If the organization      | n dia not check a     | box on line 13, 16  | a, 160, 1/a, or 1/k  |                     | nd see instruction                    |             |

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

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

| 50   | qualify under the tests listed beation A. Public Support   | elow, please com      | plete Part II.)      |                      |                   |                     |  |
|------|--|-----------------------|----------------------|----------------------|-------------------|---------------------|--|
|      |  | (a) 0010              | (h) 0017             | (-) 0010             | (4) 0010          | (-) 0000            | (f) Total  |
|      | ndar year (or fiscal year beginning in)  | <b>(a)</b> 2016       | <b>(b)</b> 2017      | (c) 2018             | (d) 2019          | (e) 2020            | (f) Total  |
| '    | Gifts, grants, contributions, and  |                       |                      |                      |                   |                     |  |
|      | membership fees received. (Do not  |                       |                      |                      |                   |                     |  |
| •    | include any "unusual grants.")   |                       |                      |                      |                   |                     |  |
| 2    | Gross receipts from admissions,<br>merchandise sold or services per-<br>formed, or facilities furnished in<br>any activity that is related to the  |                       |                      |                      |                   |                     |  |
| •    | organization's tax-exempt purpose  |                       |                      |                      |                   |                     |  |
| 3    | Gross receipts from activities that  |                       |                      |                      |                   |                     |  |
|      | are not an unrelated trade or bus-<br>iness under section 513  |                       |                      |                      |                   |                     |  |
| 4    | Tax revenues levied for the organ-   |                       |                      |                      |                   |                     |  |
| 7    | ization's benefit and either paid to   |                       |                      |                      |                   |                     |  |
|      | or expended on its behalf  |                       |                      |                      | 4                 |                     |  |
| 5    | The value of services or facilities  |                       |                      |                      | 4                 |                     |  |
| 3    | furnished by a governmental unit to  |                       |                      |                      |                   |                     |  |
|      | the organization without charge  |                       |                      |                      |                   |                     |  |
| •    | •  |                       |                      |                      |                   |                     |  |
|      | Total. Add lines 1 through 5   |                       |                      |                      |                   |                     | <del>                                     </del> |
| 78   | Amounts included on lines 1, 2, and  |                       |                      |                      |                   |                     |  |
| ,    | 3 received from disqualified persons Amounts included on lines 2 and 3 received  |                       |                      |                      |                   |                     | <del>                                     </del> |
| L    | 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  |                       |                      |                      |                   |                     |  |
|      | Public support. (Subtract line 7c from line 6.)  |                       |                      |                      |                   |                     |  |
|      | ction B. Total Support   |                       |                      |                      |                   |                     |  |
| Cale | ndar year (or fiscal year beginning in)  | (a) 2016              | <b>(b)</b> 2017      | (c) 2018             | (d) 2019          | (e) 2020            | (f) Total  |
| 9    | Amounts from line 6  |                       |                      |                      |                   |                     |  |
|      | Gross income from interest,<br>dividends, payments received on<br>securities loans, rents, royalties,<br>and income from similar sources           |                       |                      |                      |                   |                     |  |
| t    | Unrelated business taxable income (less section 511 taxes) from businesses   |                       |                      |                      |                   |                     |  |
|      | acquired after June 30, 1975   |                       |                      |                      |                   |                     |  |
|      | Add lines 10a and 10b  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 5 years. If the Form 990 is for the  | ne organization's fi  | irst, second, third, | fourth, or fifth tax | year as a section | 501(c)(3) organizat | ion,   |
|      | check this box and stop here   |                       |                      |                      |                   |                     |  |
| Se   | ction C. Computation of Publ   | ic Support Pe         | rcentage             |                      |                   |                     |  |
| 15   | Public support percentage for 2020 (   | line 8, column (f), o | divided by line 13,  | column (f))          |                   | 15                  | %  |
|      | Public support percentage from 2019  |                       |                      |                      |                   | 16                  | %  |
|      | ction D. Computation of Inves  |                       |                      |                      |                   | , ,                 |  |
| 17   |  |                       |                      | ne 13. column (f)    | )                 | 17                  | %  |
| 18   | Investment income percentage from 2  |                       |                      |                      |                   | 18                  |  |
|      | 33 1/3% support tests - 2020. If the   |                       |                      |                      |                   |                     |  |
| 190  | more than 33 1/3%, check this box a  |                       |                      |                      |                   |                     | ., is not  |
| k    | 33 1/3% support tests - 2019. If the   |                       |                      |                      |                   |                     | and  |
|      | line 18 is not more than 33 1/3%, che  |                       |                      |                      |                   |                     |  |
| 20   | Private foundation. If the organization  |                       |                      |                      |                   |                     |  |

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#### Part IV | Supporting Organizations

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

#### Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- **3a** Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.
- **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 box 12a or 12b in Part I, answer lines 4b and 4c 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 lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- **b Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 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 or 990-EZ).
- 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 9a) 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 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- **10a** Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If* "Yes," *answer line 10b below.* 
  - **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       |     |    |
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| 3с       |     |    |
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| 4a       |     |    |
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| 4b       |     |    |
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| 4c       |     |    |
|          |     |    |
| 5a       |     |    |
|          |     |    |
| 5b<br>5c |     |    |
| 00       |     |    |
| 6        |     |    |
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| 7        |     |    |
| 8        |     |    |
|          |     |    |
| 9a       |     |    |
| 9b       |     |    |
|          |     |    |
| 9с       |     |    |
| 40       |     |    |
| 10a      |     |    |
| 10b      |     |    |

| Pa  | rt IV Supporting Organizations (continued)  |          |     |    |
|-----|---|----------|-----|----|
|     | , , , , , , , , , , , , , , , , , , ,   |          | Yes | No |
| 11  | Has the organization accepted a gift or contribution from any of the following persons?   |          |     |    |
| а   | A person who directly or indirectly controls, either alone or together with persons described in lines 11b and  |          |     |    |
|     | 11c below, the governing body of a supported organization?  | 11a      |     |    |
| b   | A family member of a person described in line 11a above?  | 11b      |     |    |
| С   | A 35% controlled entity of a person described in line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide  |          |     |    |
|     | detail in Part VI.  | 11c      |     |    |
| Sec | tion B. Type I Supporting Organizations   |          |     |    |
|     |   |          | Yes | No |
| 1   | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or  |          |     |    |
|     | more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers,   |          |     |    |
|     | 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 officers, directors, or trustees were allocated among the |          |     |    |
|     | supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.  | 1        |     |    |
| 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.  | 2        |     |    |
| Sec | tion C. Type II Supporting Organizations  |          |     |    |
|     |   |          | Yes | No |
| 1   | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors  |          |     |    |
|     | or trustees of each of the organization's supported organization(s)? 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).  | 1        |     |    |
| Sec | tion D. All Type III Supporting Organizations   |          |     |    |
|     |   |          | Yes | No |
| 1   | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the  |          |     |    |
|     | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax   |          |     |    |
|     | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the  |          |     |    |
|     | organization's governing documents in effect on the date of notification, to the extent not previously provided?  | 1        |     |    |
| 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).   | 2        |     |    |
| 3   | By reason of the relationship described in line 2, above, did the organization's supported organizations have a   |          |     |    |
|     | significant voice in the organization's investment policies and in directing the use of the organization's  |          |     |    |
|     | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's  |          |     |    |
|     | supported organizations played in this regard.  | 3        |     |    |
| Sec | tion 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 yea(see instructions)  | -        |     |    |
| а   | The organization satisfied the Activities Test. Complete line 2 below.  |          |     |    |
| b   | The organization is the parent of each of its supported organizations. Complete line 3 below.   |          |     |    |
| С   | The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in   | structio |     |    |
| 2   | Activities Test. Answer lines 2a and 2b below.  |          | Yes | No |
| а   | 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.  | 2a       |     |    |
| b   | Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement,   |          |     |    |
|     | one or more of the organization's supported organization(s) would have been engaged in? 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.  | 2b       |     |    |
| 3   | Parent of Supported Organizations. Answer lines 3a and 3b below.  |          |     |    |
| а   | 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? If "Yes" or "No" provide details in Part VI.   | 3a       |     |    |
| 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 VI the role played by the organization in this regard.   | 3b       |     |    |

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| Pa   | rt V Type III Non-Functionally Integrated 509(a)(3) Supporting                   | g Org   | anizations                            | 5                              |
|------|--|---------|---------------------------------------|--------------------------------|
| 1    | Check here if the organization satisfied the Integral Part Test as a qualifying  | trust o | on Nov. 20, 1970 (explain in <b>I</b> | Part VI). See instructions.    |
|      | All other Type III non-functionally integrated supporting organizations must     | comple  | ete Sections A through E.             |                                |
| Sect | ion A - Adjusted Net Income  |         | (A) Prior Year                        | (B) Current Year<br>(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       |                                       |                                |
| Sect | ion B - Minimum Asset Amount   |         | (A) Prior Year                        | (B) Current Year<br>(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):                |         |                                       |                                |
| а    | Average monthly value of securities  | 1a      |                                       |                                |
| b    | Average monthly cash balances  | 1b      |                                       |                                |
| c    | Fair market value of other non-exempt-use assets                                 | 1c      |                                       |                                |
| d    | Total (add lines 1a, 1b, and 1c)   | 1d      |                                       |                                |
| е    | 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 0.015 of line 3 (for greater amount,      |         |                                       |                                |
|      | see instructions).   | 4       |                                       |                                |
| _5_  | Net value of non-exempt-use assets (subtract line 4 from line 3)                 | 5       |                                       |                                |
| _6_  | Multiply line 5 by 0.035.  | 6       |                                       |                                |
| _7_  | Recoveries of prior-year distributions   | 7       |                                       |                                |
| _8_  | Minimum Asset Amount (add line 7 to line 6)                                      | 8       |                                       |                                |
| Sect | ion C - Distributable Amount   |         |                                       | Current Year                   |
| _1_  | Adjusted net income for prior year (from Section A, line 8, column A)            | 1       |                                       |                                |
| 2    | Enter 0.85 of line 1.  | 2       |                                       |                                |
| _3_  | Minimum asset amount for prior year (from Section B, line 8, column A)           | 3       |                                       |                                |
| _4_  | Enter greater of line 2 or line 3.   | 4       |                                       |                                |
| _5_  | Income tax imposed in prior year   | 5       |                                       |                                |
| 6    | Distributable Amount. Subtract line 5 from line 4, unless subject to             |         |                                       |                                |
|      | emergency temporary reduction (see instructions).                                | 6       |                                       |                                |
| 7    | Check here if the current year is the organization's first as a non-functionally | integr  | ated Type III supporting orga         | anization (see                 |
|      | instructions).   |         |                                       |                                |

Schedule A (Form 990 or 990-EZ) 2020

Schedule A (Form 990 or 990-EZ) 2020 INC .

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| Par        | t V   Type III Non-Functionally Integrated 509                 | (a)(3) Supporting Orga        | anizations <sub>(continue</sub>        | <u>ed)</u> |   |
|------------|--|-------------------------------|--|------------|---|
| Secti      | on D - Distributions   |                               |  |            | Current Year                              |
| _1_        | Amounts paid to supported organizations to accomplish exe      | mpt purposes                  |  | 1          |   |
| 2          | Amounts paid to perform activity that directly furthers exempt | ot purposes of supported      |  |            |   |
|            | organizations, in excess of income from activity               |                               | 2                                      |            |   |
| 3          | Administrative expenses paid to accomplish exempt purpose      | es of supported organizatior  | ns                                     | 3          |   |
| 4          | Amounts paid to acquire exempt-use assets                      |                               |  | 4          |   |
| 5          | Qualified set-aside amounts (prior IRS approval required - pro | ovide details in Part VI)     |  | 5          |   |
| 6          | Other distributions (describe in Part VI). See instructions.   |                               |  | 6          |   |
| _7_        | <b>Total annual distributions.</b> Add lines 1 through 6.      |                               |  | 7          |   |
| 8          | Distributions to attentive supported organizations to which to | he organization is responsive | е                                      |            |   |
|            | (provide details in Part VI). See instructions.                |                               |  | 8          |   |
| 9          | Distributable amount for 2020 from Section C, line 6           |                               |  | 9          |   |
| 10         | Line 8 amount divided by line 9 amount                         |                               |  | 10         |   |
| Secti      | on E - Distribution Allocations (see instructions)             | (i)<br>Excess Distributions   | (ii)<br>Underdistributions<br>Pre-2020 | S          | (iii)<br>Distributable<br>Amount for 2020 |
| _1_        | Distributable amount for 2020 from Section C, line 6           |                               | <u> </u>                               |            |   |
| 2          | Underdistributions, if any, for years prior to 2020 (reason-   |                               |  |            |   |
|            | able cause required - explain in Part VI). See instructions.   |                               |  |            |   |
| 3          | Excess distributions carryover, if any, to 2020                |                               |  |            |   |
| a          | From 2015  |                               |  |            |   |
| b          | From 2016  |                               |  |            |   |
| c          | From 2017  |                               |  |            |   |
| d          | From 2018  |                               | <u> </u>                               |            |   |
| e          | From 2019  |                               |  |            |   |
| f          | Total of lines 3a through 3e                                   |                               |  |            |   |
|            | Applied to underdistributions of prior years                   |                               |  |            |   |
|            | Applied to 2020 distributable amount                           |                               |  |            |   |
| <u>i</u> _ | Carryover from 2015 not applied (see instructions)             |                               |  |            |   |
| j_         | Remainder. Subtract lines 3g, 3h, and 3i from line 3f.         |                               |  |            |   |
| 4          | Distributions for 2020 from Section D, line 7:                 |                               |  |            |   |
| a          | Applied to underdistributions of prior years                   |                               |  |            |   |
| b          | Applied to 2020 distributable amount                           |                               |  |            |   |
| c          | Remainder. Subtract lines 4a and 4b from line 4.               |                               |  |            |   |
| 5          | Remaining underdistributions for years prior to 2020, if       |                               |  |            |   |
|            | any. Subtract lines 3g and 4a from line 2. For result greater  |                               |  |            |   |
|            | than zero, explain in Part VI. See instructions.               |                               |  |            |   |
| 6          | Remaining underdistributions for 2020. Subtract lines 3h       |                               |  |            |   |
|            | and 4b from line 1. For result greater than zero, explain in   |                               |  |            |   |
|            | Part VI. See instructions.                                     |                               |  |            |   |
| 7          | Excess distributions carryover to 2021. Add lines 3j           |                               |  |            |   |
|            | and 4c.  |                               |  |            |   |
| _8_        | Breakdown of line 7:   |                               |  |            |   |
|            | Excess from 2016   |                               |  |            |   |
|            | Excess from 2017   |                               |  |            |   |
|            | Excess from 2018   |                               |  |            |   |
|            | Excess from 2019   |                               |  |            |   |
| <u>e</u>   | Excess from 2020   |                               |  |            |   |

Schedule A (Form 990 or 990-EZ) 2020

#### INTERNATIONAL INSTITUTE OF NEW ENGLAND

| Schedule A | Form 990 or 990-EZ) 2020 INC.   | 04-2104325 Page 8  |
|------------|---|--|
| Part VI    | <b>Supplemental Information.</b> Provide the explanations required by Part II, line 10; Part II, line 17a of Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additing (See instructions.) | or 17b; Part III, line 12;<br>1 and 2; Part IV, Section C,<br>V, Section B, line 1e; Part V, |
|            |   |  |
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#### SCHEDULE C

(Form 990 or 990-EZ)

**Political Campaign and Lobbying Activities** 

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service 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.

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

Open to Public Inspection

If the organization answered "Yes," on 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," on 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," on 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 orgar   |  | TIONAL INSTITUTE   | E OF NEW ENGI  | AND Empl  | oyer identification number  |
|   | INC.   |  |  |   | 04-2104325  |
| Part I-A  | Complete if the org  | anization is exempt un   | der section 501(c)   | or is a section 527 o   | rganization.  |
| 2 Political o   | ampaign activity expendit  | ation's direct and indirect politi<br>ures<br>gn activities  |  | ▶\$   | 38,500.   |
| Part I-B  | Complete if the org  | anization is exempt un   | der section 501(c)(  | 3).   |   |
| <ul><li>2 Enter the</li><li>3 If the orga</li><li>4a Was a co</li></ul>   | amount of any excise tax anization incurred a section  | incurred by the organization un<br>incurred by organization manag<br>n 4955 tax, did it file Form 4720   | gers under section 4955  Ofor this year?   | <b>&gt;</b> \$  | Yes No  |
| Part I-C  | Complete if the org  | anization is exempt un   | der section 501(c),  | except section 501(   | c)(3).  |
| <ul> <li>2 Enter the exempt full</li> <li>3 Total exempt full</li> <li>4 Did the fill</li> <li>5 Enter the made pay contribution</li> </ul> | amount of the filing organ unction activities mpt function expenditures ing organization file Form names, addresses and enyments. For each organizations received that were proportional activities and the file of the file o | d by the filing organization for so ization's funds contributed to one.  Add lines 1 and 2. Enter here in the contributed to one.  1120-POL for this year? in the contributed is the contributed in the contributed is the contributed in the con | and on Form 1120-POL, and on Form 1120-POL, EIN) of all section 527 pould from the filing organize a separate political organizer. | sction 527  \$ \$ \$ \$  Itical organizations to whic ation's funds. Also enter thanization, such as a separa | Yes No h the filing organization e amount of political  |
|   | (a) Name   | (b) Address  | (c) EIN  | (d) Amount paid from filing organization's funds. If none, enter -0   | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization.  If none, enter -0 |
|   |  |  |  |   |   |
|   |  |  |  |   |   |

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

Schedule C (Form 990 or 990-EZ) 2020

LHA

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Schedule C (Form 990 or 990-EZ) 2020 INC.

04-2104325 Page 2

| Part II-A Complete if the org<br>section 501(h)).  | ganization is ex                       | cempt under section                                   | on 501(c)(3) and file     | ed Form 5768 (e                  | lection under                      |
|--|--|---|---------------------------|----------------------------------|------------------------------------|
|  | ation belongs to an                    | affiliated group (and list i                          | n Part IV each affiliated | group member's nar               | ne, address, EIN,                  |
| expenses, and sha  | -                                      | - · ·   |                           |                                  |                                    |
| B Check ▶ ☐ if the filing organiza   | ation checked box A                    | A and "limited control" pr                            | ovisions apply.           |                                  |                                    |
|  | ts on Lobbying Ex<br>ditures" means an | penditures<br>nounts paid or incurred                 | .)                        | (a) Filing organization's totals | <b>(b)</b> Affiliated group totals |
| 1a Total lobbying expenditures to infl   | uence public opinio                    | on (grassroots lobbying)                              |                           |                                  |                                    |
| <b>b</b> Total lobbying expenditures to infl   | uence a legislative                    | body (direct lobbying)                                |                           |                                  |                                    |
| c Total lobbying expenditures (add l   | ines 1a and 1b)                        |   |                           |                                  |                                    |
| d Other exempt purpose expenditur  |  |   |                           |                                  |                                    |
| e Total exempt purpose expenditure   |  |   | ī                         |                                  |                                    |
| f Lobbying nontaxable amount. Ent  |  | the following table in bo                             | th columns.               |                                  |                                    |
| If the amount on line 1e, column (a)   | or (b) is: The                         | lobbying nontaxable an                                | nount is:                 |                                  |                                    |
| Not over \$500,000   | 20%                                    | of the amount on line 16                              | ).                        |                                  |                                    |
| Over \$500,000 but not over \$1,00   |  | ,000 plus 15% of the ex                               |                           |                                  |                                    |
| Over \$1,000,000 but not over \$1,5  | · ·                                    | 5,000 plus 10% of the ex                              |                           |                                  |                                    |
| Over \$1,500,000 but not over \$17   | · · ·                                  | ,000 plus 5% of the exc                               | ess over \$1,500,000.     |                                  |                                    |
| Over \$17,000,000  | \$1,0                                  | 00,000.   |                           |                                  |                                    |
|  | . 050/ 611 45                          |   |                           |                                  |                                    |
| g Grassroots nontaxable amount (er   | ,                                      |   |                           |                                  | <u> </u>                           |
| h Subtract line 1g from line 1a. If zer  | •                                      |   |                           |                                  |                                    |
| <ul><li>i Subtract line 1f from line 1c. If zero</li><li>j If there is an amount other than zero</li></ul> |  |   |                           |                                  |                                    |
| reporting section 4911 tax for this  |  |   |                           |                                  | Yes No                             |
| reporting section 4911 tax for this  |  | Averaging Period Under                                |                           |                                  | res NO                             |
| (Some organizations t  | hat made a sectio                      | n 501(h) election do not<br>parate instructions for I | have to complete all      | of the five columns I            | pelow.                             |
|  | Lobbying Ex                            | penditures During 4-Ye                                | ar Averaging Period       |                                  |                                    |
| Calendar year (or fiscal year beginning in)  | (a) 2017                               | <b>(b)</b> 2018                                       | <b>(c)</b> 2019           | ( <b>d)</b> 2020                 | (e) Total                          |
| 2a Lobbying nontaxable amount  |  |   |                           |                                  |                                    |
| <b>b</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   |  |   |                           |                                  |                                    |

Schedule C (Form 990 or 990-EZ) 2020

# Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

| For e | each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description  | (a            | a)             | (b)                                     |
|-------|--|---------------|----------------|---|
| of th | e lobbying activity.   | Yes           | No             | Amount                                  |
| 1     | During the year, did the filing organization attempt to influence foreign, national, state, or   |               |                |   |
|       | local legislation, including any attempt to influence public opinion on a legislative matter   |               |                |   |
|       | or referendum, through the use of:   |               | 37             |   |
| а     | Volunteers?  |               | X              |   |
| b     | Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?   |               | X              |   |
|       | Media advertisements?  |               | X              |   |
|       | Mailings to members, legislators, or the public?   |               | X              |   |
|       | Publications, or published or broadcast statements?  |               | X              |   |
|       | Grants to other organizations for lobbying purposes?  Direct contact with legislators, their staffs, government officials, or a legislative body?  |               | X              |   |
|       | Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  |               | X              |   |
|       | Other activities?  | Х             |                | 38,500.                                 |
| i     | Total. Add lines 1c through 1i   |               |                | 38,500.                                 |
| 2a    | Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?  |               | Х              | , |
|       | If "Yes," enter the amount of any tax incurred under section 4912  |               |                |   |
|       | If "Yes," enter the amount of any tax incurred by organization managers under section 4912   |               |                |   |
|       | If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?   |               |                |   |
|       | t III-A Complete if the organization is exempt under section 501(c)(4), section  | on 501(c)     | (5), or se     | ection                                  |
|       | 501(c)(6).   | ,             |                |   |
|       |  |               |                | Yes No                                  |
| 1     | Were substantially all (90% or more) dues received nondeductible by members?   |               | 1              |   |
| 2     | Did the organization make only in-house lobbying expenditures of \$2,000 or less?  |               | 2              |   |
| _3_   | Did the organization agree to carry over lobbying and political campaign activity expenditures from the  |               |                |   |
| Pai   | t III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(4) |               |                |   |
|       | 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered answered "Yes."   | "No" OF       | R (b) Part     | III-A, line 3, is                       |
| 1     | Dues, assessments and similar amounts from members   |               | 1              |   |
| 2     | Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenditures)  |               |                |   |
|       | expenses for which the section 527(f) tax was paid).   |               |                |   |
| а     | Current year   |               | 2a             |   |
|       | Carryover from last year   |               | l l            |   |
| С     | Total  |               | 2c             |   |
| 3     | Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues  |               | 3              |   |
| 4     | If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the exc   | cess          |                |   |
|       | does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and processing the control of th | oolitical     |                |   |
|       | expenditure next year?   |               | 4              |   |
| 5     | Taxable amount of lobbying and political expenditures (See instructions)   |               | 5              |   |
|       | t IV Supplemental Information  |               |                |   |
|       | ide 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 I | I-A, lines 1 a | and 2 (See                              |
|       | uctions); and Part II-B, line 1. Also, complete this part for any additional information.  RT II-B, LINE 1, LOBBYING ACTIVITIES:   |               |                |   |
| DU    | RING THE TAX YEAR 2021, THE ORGANIZATION PAID A CON  | SULTI         | NG GRO         | UP                                      |
| \$3   | 8,500 TO LOBBY MASSACHUSETTS LEGISLATURE IN REGARDS  | TO I          | rs fun         | DING TO                                 |
| TH    | E ORGANIZATION.  |               |                |   |
|       |  |               |                |   |
|       |  |               |                |   |
|       |  |               |                |   |

#### **SCHEDULE D** (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

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

Attach to Form 990.

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

OMB No. 1545-0047 Open to Public Inspection

Name of the organization

INTERNATIONAL INSTITUTE OF NEW ENGLAND INC.

**Employer identification number** 04-2104325

| Pai | rt I Organizations Maintaining Donor Advise  | ed Funds or Other Similar Funds or               | r Accounts. Complete if the           |
|-----|--|--|---------------------------------------|
|     | organization answered "Yes" on Form 990, Part IV, lir  | ne 6.  |                                       |
|     |  | (a) Donor advised funds                          | (b) Funds and other accounts          |
| 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   |  |                                       |
| 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?                         | Yes No                                |
| 6   | Did the organization inform all grantees, donors, and donor a  | advisors in writing that grant funds can be use  | ed only                               |
|     | for charitable purposes and not for the benefit of the donor of  | or donor advisor, or for any other purpose cor   | nferring                              |
|     |  |  |                                       |
| Pai | rt II Conservation Easements. Complete if the org  | ganization answered "Yes" on Form 990, Part      | t IV, line 7.                         |
| 1   | Purpose(s) of conservation easements held by the organizat   |  |                                       |
|     | Preservation of land for public use (for example, recrea   | ation or education) Preservation of a h          | istorically important land area       |
|     | Protection of natural habitat  | Preservation of a c                              | ertified historic structure           |
|     | Preservation of open space   |  |                                       |
| 2   | Complete lines 2a through 2d if the organization held a quali  | fied conservation contribution in the form of a  |                                       |
|     | day of the tax year.   |  | Held at the End of the Tax Year       |
|     | Total number of conservation easements   |  |                                       |
|     | Total acreage restricted by conservation easements   |  |                                       |
|     | Number of conservation easements on a certified historic str   |  |                                       |
| d   | Number of conservation easements included in (c) acquired  |  | 1 1                                   |
| _   | listed in the National Register  |  |                                       |
| 3   | Number of conservation easements modified, transferred, re   | leased, extinguished, or terminated by the or    | ganization during the tax             |
|     | year ▶   |  |                                       |
| 4   | Number of states where property subject to conservation ea   |  |                                       |
| 5   | Does the organization have a written policy regarding the pe   |  | Yes No                                |
| 6   | violations, and enforcement of the conservation easements is<br>Staff and volunteer hours devoted to monitoring, inspecting, |  |                                       |
| 6   | Stan and volunteer nours devoted to monitoring, inspecting,  | , nariding or violations, and emorcing conserv   | valion easements during the year      |
| 7   | Amount of expenses incurred in monitoring, inspecting, hand  | dling of violations, and enforcing conservation  | a easements during the year           |
| •   | \$   | ding of violations, and emoraling conservation   | reasonients during the year           |
| 8   | Does each conservation easement reported on line 2(d) above  | ve satisfy the requirements of section 170(h)(a  | 4)(B)(i)                              |
| Ū   | and section 170(h)(4)(B)(ii)?  |  |                                       |
| 9   | In Part XIII, describe how the organization reports conservat  |  |                                       |
| _   | balance sheet, and include, if applicable, the text of the foot  | •  |                                       |
|     | organization's accounting for conservation easements.  | <b>5</b>   |                                       |
| Pai | rt III Organizations Maintaining Collections o   | f Art, Historical Treasures, or Othe             | er Similar Assets.                    |
|     | Complete if the organization answered "Yes" on Form  | n 990, Part IV, line 8.                          |                                       |
| 1a  | If the organization elected, as permitted under FASB ASC 95  | 58, not to report in its revenue statement and   | balance sheet works                   |
|     | of art, historical treasures, or other similar assets held for pul   | blic exhibition, education, or research in furth | erance of public                      |
|     | service, provide in Part XIII the text of the footnote to its fina   | ncial statements that describes these items.     |                                       |
| b   | If the organization elected, as permitted under FASB ASC 95  | 58, to report in its revenue statement and bala  | ance sheet works of                   |
|     | art, historical treasures, or other similar assets held for public   | exhibition, education, or research in furthera   | ance of public service,               |
|     | provide the following amounts relating to these items:   |  |                                       |
|     | (i) Revenue included on Form 990, Part VIII, line 1  |  | <b>&gt;</b> \$                        |
|     | (ii) Assets included in Form 990, Part X   |  | · · · · · · · · · · · · · · · · · · · |
| 2   | If the organization received or held works of art, historical tre  |  |                                       |
|     | the following amounts required to be reported under FASB A   | ASC 958 relating to these items:                 |                                       |
| а   | Revenue included on Form 990, Part VIII, line 1  |  | <b>&gt;</b> \$                        |
| b   | Assets included in Form 990, Part X  |  | 🕨 \$                                  |
| LHA | For Paperwork Reduction Act Notice, see the Instruction  | s for Form 990.                                  | Schedule D (Form 990) 2020            |

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|     | dule D (Form 990) 2020 INC.                           |                          |                   |                |              | 04-2            | 10432         | 5 Pa    | age <b>2</b> |
|-----|---|--------------------------|-------------------|----------------|--------------|-----------------|---------------|---------|--------------|
| Pai | t III Organizations Maintaining Col                   | lections of Art, H       | istorical Tr      | easures, o     | r Other      | Similar Ass     | sets(contin   | ued)    |              |
| 3   | Using the organization's acquisition, accession,      | , and other records, che | eck any of the    | following that | make sign    | ificant use of  | its           |         |              |
|     | collection items (check all that apply):              | _                        | _                 |                |              |                 |               |         |              |
| а   | Public exhibition                                     | d                        | Loan or excl      | nange progra   | m            |                 |               |         |              |
| b   | Scholarly research                                    | e                        | Other             |                |              |                 |               |         |              |
| С   | Preservation for future generations                   |                          |                   |                |              |                 |               |         |              |
| 4   | Provide a description of the organization's colle-    | ctions and explain how   | they further th   | ne organizatio | n's exemp    | t purpose in F  | art XIII.     |         |              |
| 5   | During the year, did the organization solicit or re   | eceive donations of art, | historical treas  | sures, or othe | r similar as | sets            |               |         |              |
|     | to be sold to raise funds rather than to be maint     | tained as part of the or | ganization's co   | llection?      |              | [               | Yes           |         | No           |
| Pai | t IV Escrow and Custodial Arrange                     | ements. Complete if t    | he organizatio    | n answered "`  | Yes" on Fo   | rm 990, Part I  | V, line 9, or |         |              |
|     | reported an amount on Form 990, Part X                | (, line 21.              |                   |                |              |                 |               |         |              |
| 1a  | Is the organization an agent, trustee, custodian      | or other intermediary f  | or contribution   | s or other ass | ets not inc  | luded           |               |         |              |
|     | on Form 990, Part X?                                  |                          |                   |                |              | L               | Yes           | X       | No           |
| b   | If "Yes," explain the arrangement in Part XIII and    | d complete the followin  | g table:          |                |              |                 |               |         |              |
|     |   |                          |                   |                |              |                 | Amount        | :       |              |
| С   | Beginning balance                                     |                          |                   |                |              | 1c              |               |         |              |
| d   | Additions during the year                             |                          |                   |                |              | 1d              |               |         |              |
| е   | Distributions during the year                         |                          |                   |                |              | 1e              |               |         |              |
| f   | Ending balance  |                          |                   |                |              | 1f              |               |         |              |
| 2a  | Did the organization include an amount on Form        |                          |                   |                |              | }               | Yes           | X       | No           |
| b   | If "Yes," explain the arrangement in Part XIII. Ch    | neck here if the explana | ation has been    | provided on I  | Part XIII    |                 |               |         | ]            |
| Pai | rt V Endowment Funds. Complete if th                  | ne organization answere  | ed "Yes" on Fo    | rm 990, Part   | IV, line 10. |                 |               |         |              |
|     | (a  | a) Current year (b       | ) Prior year      | (c) Two years  | back (d)     | Three years bad | ck (e) Four   | years   | back         |
| 1a  | Beginning of year balance                             |                          |                   |                |              |                 |               |         |              |
| b   | Contributions   |                          |                   |                |              |                 |               |         |              |
| С   | Net investment earnings, gains, and losses            |                          |                   |                |              |                 |               |         |              |
| d   | Grants or scholarships                                |                          |                   |                |              |                 |               |         |              |
| е   | Other expenditures for facilities                     |                          |                   |                |              |                 |               |         |              |
|     | and programs  |                          |                   |                |              |                 |               |         |              |
| f   | Administrative expenses                               |                          |                   |                |              |                 |               |         |              |
| g   | End of year balance                                   |                          |                   |                |              |                 |               |         |              |
| 2   | Provide the estimated percentage of the current       | t year end balance (line | 1g, column (a     | )) held as:    |              |                 |               |         |              |
| а   | Board designated or quasi-endowment                   | %                        |                   |                |              |                 |               |         |              |
| b   | Permanent endowment                                   | %                        |                   |                |              |                 |               |         |              |
| С   | Term endowment ▶ %                                    |                          |                   |                |              |                 |               |         |              |
|     | The percentages on lines 2a, 2b, and 2c should        | l equal 100%.            |                   |                |              |                 |               |         |              |
| За  | Are there endowment funds not in the possessi         | on of the organization   | that are held a   | nd administer  | ed for the   | organization    |               |         |              |
|     | by:   |                          |                   |                |              |                 |               | Yes     | No           |
|     | (i) Unrelated organizations                           |                          |                   |                |              |                 | 3a(i)         |         |              |
|     | (ii) Related organizations                            |                          |                   |                |              |                 | 3a(ii)        |         |              |
| b   | If "Yes" on line 3a(ii), are the related organization | ns listed as required or | Schedule R?       |                |              |                 | 3b            | ĺ       |              |
| 4   | Describe in Part XIII the intended uses of the or     |                          |                   |                |              |                 |               |         |              |
| Pai | t VI Land, Buildings, and Equipmer                    |                          |                   |                |              |                 |               |         |              |
|     | Complete if the organization answered "               | Yes" on Form 990, Par    | t IV, line 11a. S | ee Form 990,   | Part X, line | e 10.           |               |         |              |
|     | Description of property                               | (a) Cost or other        | (b) Cost          |                | (c) Accu     |                 | (d) Bool      | k value | <del></del>  |
|     |   | basis (investment)       | basis (           |                | depre        |                 | . ,           |         |              |
| 1a  | Land  | <u> </u>                 |                   |                |              |                 |               |         |              |
| b   | Buildings   |                          |                   |                |              |                 |               |         |              |
|     | Leasehold improvements                                |                          | 2,31              | 6,162.         | 98           | 4,571.          | 1,33          | 1,5     | 91.          |
|     | Equipment   |                          |                   | 0,966.         |              | 3,594.          |               | 7,3     |              |
| _   | Other   |                          |                   | 7 978          |              | 7 978           |               |         | 0.           |

Schedule D (Form 990) 2020

1,738,963.

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)

|  | AL INSTITUTE               | OF NEW ENGLAND                           |                         |
|--|----------------------------|--|-------------------------|
| Schedule D (Form 990) 2020 INC.                                      |                            | 0-                                       | 4-2104325 Page          |
| Part VII Investments - Other Securities.                             |                            |  |                         |
| Complete if the organization answered "Yes"                          | -                          |  |                         |
| (a) Description of security or category (including name of security) | (b) Book value             | (c) Method of valuation: Cost or e       | nd-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"                          | on Form 990, Part IV, line | 11c. See Form 990, Part X, line 13.      |                         |
| (a) Description of investment  | (b) Book value             | (c) Method of valuation: Cost or e       | nd-of-year market value |
| (1)  |                            |  |                         |
| (2)  |                            |  |                         |
| (3)  |                            | _  |                         |
| (4)  | 4                          |  |                         |
| (5)  |                            |  |                         |
| (6)  |                            |  |                         |
| (7)  |                            |  |                         |
| (8)  |                            | 7  |                         |
| (9)  |                            |  |                         |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)     |                            |  |                         |
| Part IX Other Assets.  |                            |  |                         |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, line | 11d. See Form 990, Part X, line 15.      |                         |
| (a)  | Description                | <del>-</del>                             | (b) Book value          |
| (1)  |                            |  |                         |
| (2)  |                            |  |                         |
| (3)  |                            |  |                         |
| (4)  |                            |  |                         |
| (5)  |                            |  |                         |
| (6)  |                            |  |                         |
| (7)  |                            |  |                         |
| (8)  |                            |  |                         |
| (9)  |                            |  |                         |
| Total. (Column (b) must equal Form 990, Part X, col. (B) lin         | e 15.)                     |  | •                       |
| Part X Other Liabilities.  |                            | · · · · · · · · · · · · · · · · · · ·    | •                       |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, line | 11e or 11f. See Form 990, Part X, line 2 | 25.                     |
| 1. (a) Description of liability                                      | · · ·                      | , ,                                      | (b) Book value          |
| (1) Federal income taxes   |                            |  |                         |
| (2) DEFERRED RENT AND LEASE I  | NCENTIVES                  |  | 743,773                 |
| (3)  |                            |  | ,                       |
| (4)  |                            |  |                         |
| (5)  |                            |  | +                       |

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 FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII... X

Schedule D (Form 990) 2020

743,773.

(6) (7) (8)

570,121.

7,205,291.

7,205,291.

2e

4c

| Sche | edule D (Form 990) 2020 INC •   | 04-        | 2104325 Pag | je ⁴       |
|------|---|------------|-------------|------------|
| Pai  | rt XI Reconciliation of Revenue per Audited Financial Statements With Revenue   | per Return | n.          |            |
|      | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.     |            |             |            |
| 1    | Total revenue, gains, and other support per audited financial statements        | 1          | 9,590,35    | 4          |
| 2    | Amounts included on line 1 but not on Form 990, Part VIII, line 12:             |            |             |            |
| а    | Net unrealized gains (losses) on investments                                    |            |             |            |
| b    | Donated services and use of facilities 2b 570,                                  | 121.       |             |            |
| С    | Recoveries of prior year grants   |            |             |            |
| d    | Other (Describe in Part XIII.)  |            |             |            |
|      | Add lines 2a through 2d   | 2e         | 1,484,43    |            |
| 3    | Subtract line 2e from line 1  | 3          | 8,105,92    | 2          |
| 4    | Amounts included on Form 990, Part VIII, line 12, but not on line 1:            |            |             |            |
| а    | Investment expenses not included on Form 990, Part VIII, line 7b                |            |             |            |
| b    | Other (Describe in Part XIII.)  |            |             |            |
| С    | Add lines 4a and 4b   | 4c         |             | 0.         |
|      | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) |            | 8,105,92    | <u>2</u> . |
| Pai  | rt XII Reconciliation of Expenses per Audited Financial Statements With Expense | s per Retu | ırn.        |            |
|      | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.     |            |             |            |
| 1    | Total expenses and losses per audited financial statements                      | 1          | 7,775,41    | 2          |
| 2    | Amounts included on line 1 but not on Form 990, Part IX, line 25:               |            |             |            |
| а    | Donated services and use of facilities 2a 570,                                  | 121.       |             |            |

Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.) Part XIII Supplemental Information.

c Add lines 4a and 4b

**b** Prior year adjustments c Other losses d Other (Describe in Part XIII.)

e Add lines 2a through 2d

3 Subtract line 2e from line 1 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.)

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

#### PART X, LINE 2:

THE INSTITUTE ACCOUNTS FOR UNCERTAINTY IN INCOME TAXES IN ACCORDANCE WITH ASC TOPIC, INCOME TAXES. THIS STANDARD CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS AND PRESCRIBES A RECOGNITION THRESHOLD AND MEASUREMENT ATTRIBUTE FOR THE COMBINED FINANCIAL STATEMENTS REGARDING A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE INSTITUTE HAS DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS WHICH QUALIFY FOR EITHER RECOGNITION OR DISCLOSURE IN THE COMBINED FINANCIAL STATEMENTS AT SEPTEMBER 30, 2021.

Schedule D (Form 990) 2020

### INTERNATIONAL INSTITUTE OF NEW ENGLAND

| Schedule D (Form 990) 2020 INC.   | 04-2104325 Page 5          |
|---|----------------------------|
| Schedule D (Form 990) 2020 INC.  Part XIII Supplemental Information (continued) |                            |
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|   | Schedule D (Form 990) 2020 |

032055 12-01-20

#### **SCHEDULE G**

Department of the Treasury

Internal Revenue Service

(Form 990 or 990-EZ)

#### **Supplemental Information Regarding Fundraising or Gaming Activities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

► Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

**Open to Public** Inspection

| Name of the organization INTERNA INC.                            | TIONAL INSTITUTE C   | F N  | EW  | ENGLAND   | Employer ide 04-2104   | ntification number 325                            |
|--|--|--|---|---|--|---|
|  | Complete if the organization answe   | ered "Y  | es" o   | n Form 990, Part IV,  | line 17. Form 990-E2   | I filers are not                                  |
| Indicate whether the organization rais                           | sed funds through any of the following and solicitates and solicitates and solicitates are solicitated as a solicitate and solicitates are solicitated as a solicitated are solicitated as a s | tion of<br>tion of<br>fundra<br>(includerofess | non-g<br>gover<br>lising<br>ding o<br>ional f | overnment grants nment grants events fficers, directors, true fundraising services? | stees, or X Yes  |   |
| (i) Name and address of individual or entity (fundraiser)        | (ii) Activity  | fundr<br>have c<br>or cor<br>contrib           | Did<br>aiser<br>ustody<br>trol of<br>utions?  | (iv) Gross receipts from activity   | (v) Amount paid<br>to (or retained by)<br>fundraiser<br>listed in col. (i) | (vi) Amount paid to (or retained by) organization |
| SHAHET CONSULTING - 3 SAWIN                                      | MARKETING AND  | Yes₄   | No  |   |  |   |
| ST, ARLINGTON, MA 02474  | COMMUNICATIONS   |  | X   | 0.  | 39,450.  | 39,450.   |
|  |  | K  |   |   |  |   |
|  |  |  |   |   |  |   |
|  |  |  |   |   |  |   |
|  |  |  |   |   |  |   |
|  |  |  |   |   |  |   |
| Total  3 List all states in which the organization or licensing. | on is registered or licensed to solicit  |  | utions  | s or has been notified  | 39,450.<br>d it is exempt from re  | 39,450.<br>egistration                            |
|  |  |  |   |   |  |   |
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LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule G (Form 990 or 990-EZ) 2020

04-2104325 Page 2

|     |     | of fundraising event contributions and gro   | (a) Event #1             | <b>(b)</b> Event #2                                    | (c) Other events      | (d) Total events (add col. (a) through       |
|-----|-----|--|--------------------------|--|-----------------------|--|
|     |     |  | (ayont typo)             | (event type)   | (total number)        | col. (c)                                     |
|     |     |  | (event type)             | (event type)   | (total number)        |  |
|     | 1   | Gross receipts   |                          |  |                       |  |
| l   | _   |  |                          |  |                       |  |
|     | 2   | Less: Contributions  |                          |  |                       |  |
| _   | 3   | Gross income (line 1 minus line 2)   |                          |  |                       |  |
|     | 4   | Cash prizes  |                          |  |                       |  |
|     | 5   | Noncash prizes   |                          |  |                       |  |
|     | 6   | Rent/facility costs  |                          | A  |                       |  |
| 1   |     |  |                          |  |                       |  |
|     | 7   | Food and beverages   |                          |  |                       |  |
|     | 8   | Entertainment  |                          |  |                       |  |
| Т   | 9   | Other direct expenses  |                          |  |                       |  |
| -   | 10  | Direct expense summary. Add lines 4 through  |                          |  | <b>&gt;</b>           |  |
| -   | 11  | Net income summary. Subtract line 10 from li   | ne 3, column (d)         |  | <b>&gt;</b>           |  |
| ar  | t I |  | answered "Yes" on Form   | n 990, Part IV, line 19,                               | or reported more than |  |
| _   |     | \$15,000 on Form 990-EZ, line 6a.  |                          |  | _                     | _  |
|     |     |  | (a) Bingo                | <b>(b)</b> Pull tabs/instant<br>bingo/progressive bing | (c) Other gaming      | (d) Total gaming (ad col. (a) through col. ( |
|     | 1   | Gross revenue  |                          |  |                       |  |
|     | 2   | Cash prizes  |                          |  |                       |  |
|     | 3   | Noncash prizes   |                          |  |                       |  |
| -   | 4   | Rent/facility costs  |                          |  |                       |  |
|     | 5   | Other direct expenses  |                          |  |                       |  |
| Ť   |     | Volunteer labor  | Yes %                    | Yes9   | % Yes %               |  |
|     |     | Direct expense summary. Add lines 2 through  |                          | •  | •                     |  |
|     | •   | bliect expense summary. Add lines 2 tillougi   | 13 III Columni (a)       |  |                       |  |
|     | 8   | Net gaming income summary. Subtract line 7   | from line 1, column (d)  |  | <b>&gt;</b>           |  |
|     |     |  |                          |  |                       |  |
|     |     | er the state(s) in which the organization condu<br>he organization licensed to conduct gaming ac | · · · · —                | ototoo?  |                       | Yes N  |
|     |     |  |                          |  |                       | 165  |
|     |     | No," explain:  |                          |  |                       |  |
|     |     |  |                          |  |                       |  |
| -   |     | re any of the organization's gaming licenses re  | evoked, suspended, or to | erminated during the t                                 | ax year?              | Yes N  |
| a \ | Иe  |  |                          |  |                       |  |
|     |     | Yes," explain:   |                          |  |                       |  |
|     |     |  |                          |  |                       |  |

#### INTERNATIONAL INSTITUTE OF NEW ENGLAND

| Schedule G (Form 990 or 990-EZ) 2020 INC.   | 04-2           | 104        | 325    | Page 3   |
|---|----------------|------------|--------|----------|
| 11 Does the organization conduct gaming activities with nonmembers?   |                |            | Yes    | ☐ No     |
| 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity former  |                |            |        |          |
| to administer charitable gaming?  |                |            | Yes    | ☐ No     |
| 13 Indicate the percentage of gaming activity conducted in:   |                |            |        |          |
| a The organization's facility   |                | 13a        |        | %        |
| <b>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 it            | ecords:        |            |        |          |
| Name  |                |            |        |          |
| Address >   |                |            |        |          |
| 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?          |                | ,          | Yes    | ☐ No     |
| <b>b</b> If "Yes," enter the amount of gaming revenue received by the organization ▶\$ and the                            | amount         |            |        |          |
| of gaming revenue retained by the third party > \$  |                |            |        |          |
| c If "Yes," enter name and address of the third party:  |                |            |        |          |
| Name  |                |            |        |          |
| Address ►   |                |            |        |          |
|   |                |            |        |          |
| 16 Gaming manager information:  |                |            |        |          |
|   |                |            |        |          |
| Name  |                |            |        |          |
| Gaming manager compensation ▶ \$  |                |            |        |          |
|   |                |            |        |          |
| Description of services provided  |                |            |        |          |
|   |                |            |        |          |
|   |                |            |        |          |
| Director/officer 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?  |                |            | Yes    | ☐ No     |
| <b>b</b> Enter the amount of distributions required under state law to be distributed to other exempt organizations or sp |                |            |        |          |
| organization's own exempt activities during the tax year ▶ \$   |                |            |        |          |
| Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) an                  | d (v); and Par | t III, lir | nes 9, | 9b, 10b, |
| 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.                          |                |            |        |          |
|   |                |            |        |          |
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#### INTERNATIONAL INSTITUTE OF NEW ENGLAND

| Schedule G (Forn | m 990 or 990-EZ)                     | INC.               | <br> | 04-2104325 Pag                  | <u>je <b>4</b></u> |
|------------------|--------------------------------------|--------------------|------|---------------------------------|--------------------|
| Part IV Sup      | n 990 or 990-EZ)<br>pplemental Infor | mation (continued) | <br> |                                 |                    |
|                  |                                      |                    | <br> |                                 |                    |
|                  |                                      |                    | <br> |                                 |                    |
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|                  |                                      |                    |      | Schedule G (Form 990 or 990     | -F7                |
|                  |                                      |                    |      | Ocheudie (4 (1 01111 330 01 330 | -4                 |

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#### SCHEDULE I (Form 990)

Department of the Treasury Internal Revenue Service

# **Grants and Other Assistance to Organizations, Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► Attach to Form 990.

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

Open to Public Inspection

OMB No. 1545-0047

| Name of th | ie organization INTERNATI INC.   | ONAL INST            | TIOTE OF NE                        | W ENGLAND                |                                   |  |                                       | Employer identification number $04-2104325$ |
|------------|--|----------------------|------------------------------------|--------------------------|-----------------------------------|--|---------------------------------------|---|
| Part I     | General Information on Grants a  | nd Assistance        |                                    |                          |                                   |  |                                       | 3 3 - 3 - 3                                 |
| crite      | s the organization maintain records<br>ria used to award the grants or assi<br>cribe in Part IV the organization's pro | stance?              |                                    |                          |                                   |  |                                       |   |
| Part II    | Grants and Other Assistance to   | Domestic Organi      | zations and Domesti                | c Governments. C         | omplete if the org                | anization answered "Y  | es" on Form 990, Par                  | t IV, line 21, for any                      |
|            | recipient that received more than  | \$5,000. Part II can | be duplicated if addit             | ional space is need      | ded.                              | (2)  | 1                                     |   |
| 1 (a) N    | lame and address of organization or government   | ( <b>b)</b> EIN      | (c) IRC section<br>(if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of<br>valuation (book,<br>FMV, appraisal,<br>other) | (g) Description of noncash assistance | (h) Purpose of grant<br>or assistance       |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
|            |  |                      |                                    |                          |                                   |  |                                       |   |
| 2 Ente     | r total number of section 501(c)(3) a  | nd government or     | ganizations listed in th           | e line 1 table           |                                   |  |                                       | <b>&gt;</b>                                 |
| 3 Ente     | r total number of other organization   | s listed in the line | 1 table                            |                          |                                   |  |                                       |   |

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

Schedule I (Form 990) 2020

| Schedule I | (Form 990) 2020 <b>INC</b> •  |                    |                    |                      |                         | 04-2104325                 | Page 2     |
|------------|---|--------------------|--------------------|----------------------|-------------------------|----------------------------|------------|
| Part III   | Grants and Other Assistance to Domestic Individuals Part III can be duplicated if additional space is needed. | s. Complete if the | organization answe | ered "Yes" on Form 9 | 990, Part IV, line 22.  |                            |            |
|            | (a) Type of grant or assistance   | (b) Number of      | (c) Amount of      | (d) Amount of non-   | (e) Method of valuation | (f) Description of noncash | assistance |

| (a) Type of grant or assistance                 | <b>(b)</b> Number of recipients | (c) Amount of cash grant | (d) Amount of non-<br>cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---|---------------------------------|--------------------------|---------------------------------------|---|---------------------------------------|
|   |                                 |                          |                                       |   |                                       |
| PROVIDED ASSISTANCE TO IMMIGRANTS AND REFUGEES. | 863                             | 617,377.                 | 0.                                    |   |                                       |
|   |                                 |                          | 4                                     |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |
|   |                                 |                          |                                       |   |                                       |

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

PART I, LINE 2:

THE PROGRAM DIRECTOR IS RESPONSIBLE FOR THE MAINTENANCE OF GRANTS AND THE CHANGE, CONTROL, OR MANAGEMENT OF OUTCOMES, THE FINANCE DEPARTMENT IS RESPONSIBLE FOR CHARGES AND COST MONITORING, ORDERING PROCEDURES, PAYMENT PROCEDURES, BUDGET PROCEDURES, RESOURCE MANAGEMENT AND PLANNING, ASSET MANAGEMENT, AND REPORTING MANAGEMENT. THE POINT OF CONTACT FOR EACH INDIVIDUAL GRANT IS RESPONSIBLE FOR THE MANAGEMENT OF REQUIREMENTS AND PROCEDURES OF GRANTS.

#### **SCHEDULE J** (Form 990)

**Compensation Information** 

For certain Officers, Directors, Trustees, Key Employees, and Highest

Compensated Employees

Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

► Attach to Form 990. ► Go to www.irs.gov/Form990 for instructions and the latest information. Open to Public Inspection

OMB No. 1545-0047

Name of the organization

Part I Questions Regarding Compensation

Department of the Treasury

Internal Revenue Service

INTERNATIONAL INSTITUTE OF NEW ENGLAND INC.

**Employer identification number** 04-2104325

|            | ·  |    | Yes | No  |
|------------|--|----|-----|-----|
| <b>1</b> a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, |    |     |     |
|            | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.             |    |     |     |
|            | First-class or charter travel Housing allowance or residence for personal use  |    |     |     |
|            | Travel for companions Payments for business use of personal residence  |    |     |     |
|            | Tax indemnification and gross-up payments Health or social club dues or initiation fees                                |    |     |     |
|            | Discretionary spending account Personal services (such as maid, chauffeur, chef)                                       |    |     |     |
|            |  |    |     |     |
| b          | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or          |    |     |     |
|            | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain               | 1b |     |     |
| 2          | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,       |    |     |     |
|            | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?                  | 2  |     |     |
|            |  |    |     |     |
| 3          | Indicate which, if any, of the following the organization used to establish the compensation of the organization's     |    |     |     |
|            | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to     |    |     |     |
|            | establish compensation of the CEO/Executive Director, but explain in Part III.   |    |     |     |
|            | Compensation committee   |    |     |     |
|            | Independent compensation consultant Compensation survey or study   |    |     |     |
|            | Form 990 of other organizations  X Approval by the board or compensation committee                                     |    |     |     |
|            |  |    |     |     |
| 4          | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing           |    |     |     |
|            | organization or a related organization:  |    |     |     |
|            | Receive a severance payment or change-of-control payment?  | 4a |     | X   |
|            | Participate in or receive payment from a supplemental nonqualified retirement plan?                                    | 4b |     | Х   |
| С          | Participate in or receive payment from an equity-based compensation arrangement?                                       | 4c |     | Х   |
|            | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.          |    |     |     |
|            |  |    |     |     |
|            | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.                               |    |     |     |
| 5          | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |     |
|            | contingent on the revenues of:   |    |     |     |
|            | The organization?  | 5a |     | X   |
| b          | Any related organization?  | 5b |     | Х   |
|            | If "Yes" on line 5a or 5b, describe in Part III.   |    |     |     |
| 6          | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |     |
|            | contingent on the net earnings of:   |    |     | 7.7 |
|            | The organization?  | 6a |     | X   |
| b          | Any related organization?  | 6b |     | Х   |
|            | If "Yes" on line 6a or 6b, describe in Part III.   |    |     |     |
| 7          | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments       |    |     | 37  |
|            | not described on lines 5 and 6? If "Yes," describe in Part III   | 7  |     | X   |
| 8          | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the        |    |     | 37  |
|            | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III            | 8  |     | X   |
| 9          | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in                 |    |     |     |
|            | Regulations section 53 4958-6(c)?  | 9  |     | ı   |

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Schedule J (Form 990) 2020

INC.

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

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

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

|                             |      | (B) Breakdown of         | W-2 and/or 1099-MI                        | SC compensation                           | (C) Retirement and other deferred | (D) Nontaxable benefits | (E) Total of columns | (F) Compensation in column (B)            |
|-----------------------------|------|--------------------------|---|---|-----------------------------------|-------------------------|----------------------|---|
| (A) Name and Title          |      | (i) Base<br>compensation | (ii) Bonus &<br>incentive<br>compensation | (iii) Other<br>reportable<br>compensation | compensation                      | benefits                | (B)(i)-(D)           | reported as deferred<br>on prior Form 990 |
| (1) JEFFREY THIELMAN        | (i)  | 201,664.                 | 0.  | 0.  | 0.                                | 1,279.                  | 202,943.             | 0.  |
| PRESIDENT, CEO, & TREASURER | (ii) | 0.                       | 0.  | 0.  | 0.                                | 0.                      | 0.                   | 0.  |
| (2) RITA MCDONOUGH          | (i)  | 154,820.                 | 0.  | 0.  | 6,923.                            | 3,751.                  | 165,494.             | 0.  |
| CFO (LEFT DEC 2020)         | (ii) | 0.                       | 0.  | 0.  | 0.                                | 0.                      |                      | 0.  |
| (3) ALEXANDRA WEBER         | (i)  | 132,080.                 | 0.  | 0.  | 5,577.                            | 16,784.                 |                      | 0.  |
| CHIEF PROGRAM OFFICER       | (ii) | 0.                       | 0.  | 0.  | 0.                                | 0.                      | 0.                   | 0.  |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
|                             | (ii) |                          |   |   |                                   |                         |                      |   |
|                             | (i)  |                          |   |   |                                   |                         |                      |   |
| -                           | (ii) |                          |   |   |                                   |                         |                      |   |

| Part III Supplemental Information  |
|--|
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
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#### **SCHEDULE M** (Form 990)

**Noncash Contributions** 

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization

► Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

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

INTERNATIONAL INSTITUTE OF NEW ENGLAND INC.

Employer identification number 04 - 2104325

| Pai      | rt I Types of Property                            |                     |                            |   |                                  |          |      |   |
|----------|---|---------------------|----------------------------|---|----------------------------------|----------|------|---|
|          |   | (a)                 | (b)                        | (c)   | (d)                              |          |      |   |
|          |   | Check if applicable | Number of contributions or | Noncash contribution<br>amounts reported on | Method of de<br>noncash contribu |          | -    |   |
|          |   | арріісаріє          |                            | Form 990, Part VIII, line 1g                | Horicasii contribu               | ition am | ount | <u>,                                     </u> |
| 1        | Art - Works of art                                |                     |                            |   |                                  |          |      |   |
| 2        | Art - Historical treasures                        |                     |                            |   |                                  |          |      |   |
| 3        | Art - Fractional interests                        |                     |                            |   |                                  |          |      |   |
| 4        | Books and publications                            |                     |                            |   |                                  |          |      |   |
| 5        | Clothing and household goods                      | X                   |                            | 46,920.                                     | FAIR MARKET                      | VAL      | UE   |   |
| 6        | Cars and other vehicles                           |                     |                            |   |                                  |          |      |   |
| 7        | Boats and planes                                  |                     |                            |   |                                  |          |      |   |
| 8        | Intellectual property                             |                     |                            |   |                                  |          |      |   |
| 9        | Securities - Publicly traded                      |                     |                            |   |                                  |          |      |   |
| 10       | Securities - Closely held stock                   |                     |                            |   |                                  |          |      |   |
| 11       | Securities - Partnership, LLC, or                 |                     |                            |   |                                  |          |      |   |
|          | trust interests                                   |                     |                            |   |                                  |          |      |   |
| 12       | Securities - Miscellaneous                        |                     |                            |   |                                  |          |      |   |
| 13       | Qualified conservation contribution -             |                     |                            |   |                                  |          |      |   |
|          | Historic structures                               |                     |                            | Y   |                                  |          |      |   |
| 14       | Qualified conservation contribution - Other       |                     |                            |   |                                  |          |      |   |
| 15       | Real estate - Residential                         |                     |                            |   |                                  |          |      |   |
| 16       | Real estate - Commercial                          |                     |                            |   |                                  |          |      |   |
| 17       | Real estate - Other                               |                     |                            |   |                                  |          |      |   |
| 18       | Collectibles                                      |                     |                            |   |                                  |          |      |   |
| 19       | Food inventory                                    |                     |                            |   |                                  |          |      |   |
| 20       | Drugs and medical supplies                        |                     |                            |   |                                  |          |      |   |
| 21       | Taxidermy   |                     |                            |   |                                  |          |      |   |
| 22       | Historical artifacts                              |                     |                            |   |                                  |          |      |   |
| 23       | Scientific specimens                              |                     |                            |   |                                  |          |      |   |
| 24       | Archeological artifacts                           |                     |                            |   |                                  |          |      |   |
| 25<br>26 | Other () Other (                                  |                     |                            |   |                                  |          |      |   |
| 27       | Other (   |                     |                            |   |                                  |          |      |   |
| 28       | Other (   |                     |                            |   |                                  |          |      |   |
| 29       | Number of Forms 8283 received by the organization | zation durin        | I<br>o the tax vear for c  | contributions                               |                                  |          |      |   |
|          | for which the organization completed Form 828     |                     | ,                          |   |                                  |          |      |   |
|          | To Whom the organization completed from 520       | 50,1 411 1, 1       | on our termous             |   |                                  |          | ⁄es  | No  |
| 30a      | During the year, did the organization receive by  | v contribution      | on any property rea        | oorted in Part I. lines 1 throu             | gh 28, that it                   |          |      |   |
|          | must hold for at least three years from the date  |                     |                            |   |                                  |          |      |   |
|          | exempt purposes for the entire holding period?    |                     | •                          | •   |                                  | 30a      |      | Х   |
| b        | If "Yes," describe the arrangement in Part II.    |                     |                            |   |                                  |          |      |   |
| 31       | Does the organization have a gift acceptance p    | oolicy that r       | equires the review         | of any nonstandard contrib                  | utions?                          | 31       |      | Х   |
| 32a      | Does the organization hire or use third parties   |                     |                            |   |                                  |          |      |   |
|          | contributions?                                    |                     |                            | · ·   |                                  | 32a      |      | Х   |
| b        | If "Yes," describe in Part II.                    |                     |                            |   |                                  |          |      |   |
| 33       | If the organization didn't report an amount in c  | olumn (c) fo        | r a type of propert        | y for which column (a) is che               | ecked,                           |          |      |   |
|          | describe in Part II.                              |                     |                            |   |                                  |          |      |   |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2020

Schedule M (Form 990) 2020

032142 11-23-20

#### SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

### Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ.

Open to Public Inspection

OMB No. 1545-0047

Name of the organization

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

INTERNATIONAL INSTITUTE OF NEW ENGLAND

INC

Employer identification number 04-2104325

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SUCCEED THROUGH RESETTLEMENT, EDUCATION, CAREER ADVANCEMENT AND

PATHWAYS TO CITIZENSHIP. IN FY2021, IINE SERVED 3,285 REFUGEES,

ASYLEES, VICTIMS OF HUMAN TRAFFICKING, UNACCOMPANIED MINORS, ENTRANTS,

AND OTHER IMMIGRANTS FROM AROUND THE WORLD THROUGH OUR RESETTLEMENT,

CASE MANAGEMENT, EMPLOYMENT, EDUCATION, FAMILY REUNIFICATION AND LEGAL

PROGRAMS. IINE'S ADMINISTRATIVE OFFICE IS CO-LOCATED WITH OUR BOSTON

SERVICE CENTER IN DOWNTOWN BOSTON, MA, AND IINE MAINTAINS CLIENT

SERVICES CENTERS IN LOWELL, MA AND MANCHESTER, NH.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: COMMUNITIES. WE ALSO HELPED REMOVE BARRIERS TO ACCESSING SUPPORT: WE ENROLLED REFUGEES IN PUBLIC BENEFITS-INCLUDING UNEMPLOYMENT BENEFITS-AND HEALTHCARE PROGRAMS; CONNECTED THEM WITH LOCAL RESOURCES; INCLUDING OUR ON-SITE FOOD PANTRY; HELPED THEM SECURE EMPLOYMENT AND ADVANCED SKILLS TRAINING; AND PROVIDED THEM WITH COVID-19 HEALTH EDUCATION, RESOURCES, AND VACCINATION ACCESS. EMPLOYMENT SERVICES AND SKILLS TRAINING PROGRAMS - IINE-BOSTON STAFF HELPED EMPLOYABLE REFUGEES, ASYLEES AND OTHER IMMIGRANT POPULATIONS FIND DURABLE, GAINFUL EMPLOYMENT IN ENTRY-LEVEL AND CAREER LADDERING POSITIONS, AND OFFERED REEMPLOYMENT SUPPORT TO THOSE WHO LOST THEIR JOBS DURING THE PANDEMIC. IN FY2021, WE ASSESSED EACH REFUGEE'S SKILLS AND INTERESTS, PROVIDED WORKFORCE ORIENTATION, PREPARED CLIENTS FOR INTERVIEWS, AND HELPED PLACE THEM IN JOBS WITH LOCAL EMPLOYERS. OVER THE YEARS, WE HAVE BUILT A NETWORK OF EMPLOYER RELATIONSHIPS TO SUPPORT REFUGEE AND IMMIGRANT JOB PREPARATION AND PLACEMENT. THE BOSTON SITE LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule O (Form 990 or 990-EZ) 2020

Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND **Employer identification number** INC. 04-2104325 ALSO CONTINUED A NEW PRE-CONSTRUCTION APPRENTICESHIP TRAINING PROGRAM WITH AREA PARTNERS IN FY21, AND CONTINUED TRAINING AND PLACING CLIENTS IN HEALTHCARE POSITIONS. ADULT BASIC EDUCATION - IINE BOSTON CONVERTED SERVICES TO REMOTE DELIVERY DUE TO THE COVID-19 PANDEMIC AND CONTINUED TO OFFER FOUR LEVELS OF ENGLISH LANGUAGE VIRTUAL INSTRUCTION: BEGINNER, LOW INTERMEDIATE, HIGH INTERMEDIATE, AND ADVANCED, WITH A FOCUS ON VOCATIONAL PREPARATION. REPRESENTING MORE THAN 50 COUNTRIES OF ORIGIN, OUR PARTICIPANTS CAME TO THE U.S. WITH A WIDE VARIETY OF ENGLISH LANGUAGE SKILLS, FROM LITTLE OR NO ENGLISH LITERACY TO THOSE WHO WERE ADVANCED AND SEEKING TO IMPROVE THEIR FLUENCY. ANTI-HUMAN TRAFFICKING - OUR BOSTON OFFICE OVERSEES DIRECT CLIENT SERVICES TO VICTIMS OF HUMAN TRAFFICKING, DEFINED AS SURVIVORS OF MODERN-DAY SLAVERY INVOLVING THE USE OF FORCE, FRAUD, OR COERCION TO OBTAIN SOME TYPE OF LABOR OR COMMERCIAL SEX ACT. OUR STAFF WORKED TO CONNECT ADULT AND CHILD SURVIVORS TO BENEFITS, SUPPORT SERVICES, AND EMPLOYMENT OR SCHOOL ENROLLMENT, GUIDING THEM ON A PATH OF RESTORED DIGNITY AND HOPE. UNACCOMPANIED MINORS PROGRAM - IINE OFFERS A HOME STUDY AND POST-RELEASE SERVICES PROGRAM FOR UNACCOMPANIED CENTRAL AMERICAN MINORS REUNITING WITH FAMILY MEMBERS IN NEW ENGLAND. BASED IN THE BOSTON OFFICE, OUR UNACCOMPANIED MINORS CASE MANAGEMENT TEAM SUPPORTED THE REUNIFICATION OF HUNDREDS OF CENTRAL AMERICAN CHILDREN WITH THEIR FAMILY MEMBERS LIVING IN THE U.S. LEGAL IMMIGRATION SERVICES - LAUNCHED IN FEBRUARY 2018, OUR LEGAL SERVICES TEAM PROVIDES BOSTON-AREA IMMIGRANTS WITH TRUSTWORTHY AND AFFORDABLE ASSISTANCE IN APPLYING FOR IMMIGRATION RELIEF. LEGAL SERVICES SUPPORTED A RANGE OF LEGAL IMMIGRATION FORMS UNIQUE TO THE 032212 11-20-20 Schedule O (Form 990 or 990-EZ) 2020 Schedule O (Form 990 or 990-EZ) 2020 Page 2 Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND **Employer identification number** INC. 04-2104325 IMMIGRANT COMMUNITY, SUCH AS STATUS ADJUSTMENT, WORK AUTHORIZATION, FAMILY REUNIFICATION, AND CITIZENSHIP. IN 2021, WE SERVED 1,410 INDIVIDUALS THROUGH OUR THREE-SITE LEGAL SERVICES PROGRAM. VOLUNTEER PROGRAM - BOSTON SITE VOLUNTEERS AND INTERNS PROVIDED 8,213 HOURS OF PROGRAM AND CLIENT SUPPORT. VOLUNTEERS AND INTERNS SUPPORT CULTURAL ORIENTATION CLASSES, PROVIDE ENGLISH TUTORING, LEAD SKILLS AND FINANCIAL LITERACY WORKSHOPS, ORGANIZE SUPPLY DRIVES, HOST COMMUNITY DINNERS, AND MORE.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS: ENROLLED REFUGEES IN PUBLIC BENEFITS-INCLUDING UNEMPLOYMENT BENEFITS-AND HEALTHCARE PROGRAMS; CONNECTED THEM WITH LOCAL RESOURCES; INCLUDING OUR ON-SITE FOOD PANTRY; HELPED THEM SECURE EMPLOYMENT AND ADVANCED SKILLS TRAINING; AND PROVIDED THEM WITH COVID-19 HEALTH EDUCATION, RESOURCES, AND VACCINATION ACCESS. EMPLOYMENT SERVICE - IINE LOWELL STAFF HELPED EMPLOYABLE REFUGEES, ASYLEES AND OTHER IMMIGRANT POPULATIONS FIND DURABLE, GAINFUL EMPLOYMENT AS QUICKLY AS POSSIBLE AFTER THEIR ARRIVALS IN ENTRY-LEVEL AND CAREER LADDERING POSITIONS, AND OFFERED REEMPLOYMENT SUPPORT TO THOSE WHO LOST THEIR JOBS DURING THE PANDEMIC. IN FY2021, WE ASSESSED EACH REFUGEE'S SKILLS AND INTERESTS, PROVIDED WORKFORCE ORIENTATION, PREPARED CLIENTS FOR INTERVIEWS, AND HELPED PLACE THEM IN JOBS WITH LOCAL EMPLOYERS. OVER THE YEARS, WE HAVE BUILT A NETWORK OF EMPLOYER RELATIONSHIPS TO SUPPORT REFUGEE AND IMMIGRANT JOB PREPARATION AND PLACEMENT. IN FY2021, IINE-LOWELL EXPANDED ITS 16-WEEK CERTIFIED NURSING ASSISTANT (CAN) FOR SUCCESS PROGRAM THROUGH WHICH IINE PROVIDES CONTEXTUALIZED ENGLISH LANGUAGE INSTRUCTION, SOFT-SKILLS TRAINING AND WORKFORCE READINESS TRAINING TO THOSE SEEKING CERTIFIED NURSING

Schedule O (Form 990 or 990-EZ) 2020

Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND **Employer identification number** INC. 04-2104325 ASSISTANT CERTIFICATION AND JOB PLACEMENT. ADULT BASIC EDUCATION - IINE-LOWELL'S ESOL PROGRAM MOVED TO REMOTE DELIVERY IN FY2021 DUE TO THE COVID-19 PANDEMIC AND PROVIDED STUDENTS WITH THE LANGUAGE SKILLS AND CULTURAL KNOWLEDGE NEEDED TO OBTAIN THEIR FIRST JOBS, ACQUIRE BETTER-PAYING POSITIONS, OR PERFORM THEIR CURRENT JOBS AT A HIGHER LEVEL. THE CLASSES CONTINUED TO OFFER A DUAL FOCUS ON PROVIDING VOCATIONAL AND SOFT SKILLS AS WELL AS LIFE SKILLS ENGLISH INSTRUCTION. LEGAL IMMIGRATION SERVICES - LAUNCHED IN FEBRUARY 2018, OUR LEGAL SERVICES TEAM PROVIDES BOSTON-AREA IMMIGRANTS WITH TRUSTWORTHY AND AFFORDABLE ASSISTANCE IN APPLYING FOR IMMIGRATION RELIEF. LEGAL SERVICES SUPPORTED A RANGE OF LEGAL IMMIGRATION FORMS UNIQUE TO THE IMMIGRANT COMMUNITY, SUCH AS STATUS ADJUSTMENT, WORK AUTHORIZATION, FAMILY REUNIFICATION, AND CITIZENSHIP. IN 2021, WE SERVED 1,410 INDIVIDUALS THROUGH OUR THREE-SITE LEGAL SERVICES PROGRAM. YOUTH MENTORING SERVICES -- IINE-LOWELL PAIRS REFUGEE YOUTH WITH COMMUNITY MENTORS TO SUPPORT LIFE SKILLS DEVELOPMENT, HIGH SCHOOL COMPLETION, PREPARATION AND APPLICATION FOR COLLEGE, AND WORK EXPLORATION AND ENTRY. VOLUNTEER PROGRAM - IINE-LOWELL SITE VOLUNTEERS AND INTERNS PROVIDED 5,249 HOURS OF PROGRAM AND CLIENT SUPPORT. VOLUNTEERS AND INTERNS SUPPORT CULTURAL ORIENTATION CLASSES, PROVIDE ENGLISH TUTORING, LEAD SKILLS AND FINANCIAL LITERACY WORKSHOPS, ORGANIZE SUPPLY DRIVES, HOST COMMUNITY DINNERS, AND MORE.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS: SUPPORT: WE ENROLLED REFUGEES IN PUBLIC BENEFITS-INCLUDING UNEMPLOYMENT BENEFITS-AND HEALTHCARE PROGRAMS; CONNECTED THEM WITH LOCAL RESOURCES; 032212 11-20-20

Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND **Employer identification number** INC. 04-2104325 INCLUDING OUR ON-SITE FOOD PANTRY; HELPED THEM SECURE EMPLOYMENT AND ADVANCED SKILLS TRAINING; AND PROVIDED THEM WITH COVID-19 HEALTH EDUCATION, RESOURCES, AND VACCINATION ACCESS. EMPLOYMENT SERVICE - IINE-MANCHESTER STAFF HELPED EMPLOYABLE REFUGEES, ASYLEES AND OTHER IMMIGRANT POPULATIONS FIND DURABLE, GAINFUL EMPLOYMENT AS QUICKLY AS POSSIBLE AFTER THEIR ARRIVALS IN ENTRY-LEVEL AND CAREER LADDERING POSITIONS, AND OFFERED REEMPLOYMENT SUPPORT TO THOSE WHO LOST THEIR JOBS DURING THE PANDEMIC. IN FY2021, WE ASSESSED EACH REFUGEE'S SKILLS AND INTERESTS, PROVIDED WORKFORCE ORIENTATION, PREPARED CLIENTS FOR INTERVIEWS, AND HELPED PLACE THEM IN JOBS WITH LOCAL EMPLOYERS. ADULT BASIC EDUCATION - IINE-MANCHESTER'S ESOL PROGRAM MOVED TO REMOTE DELIVERY IN FY2021 DUE TO THE COVID-19 PANDEMIC AND PROVIDED STUDENTS WITH THE LANGUAGE SKILLS AND CULTURAL KNOWLEDGE NEEDED TO OBTAIN THEIR FIRST JOBS, ACQUIRE BETTER-PAYING POSITIONS, OR PERFORM THEIR CURRENT JOBS AT A HIGHER LEVEL. THE CLASSES CONTINUED TO OFFER A DUAL FOCUS ON PROVIDING VOCATIONAL AND SOFT SKILLS AS WELL AS LIFE SKILLS ENGLISH INSTRUCTION. LEGAL IMMIGRATION SERVICES - LAUNCHED IN FEBRUARY 2018, OUR LEGAL SERVICES TEAM PROVIDES BOSTON-AREA IMMIGRANTS WITH TRUSTWORTHY AND AFFORDABLE ASSISTANCE IN APPLYING FOR IMMIGRATION RELIEF. LEGAL SERVICES SUPPORTED A RANGE OF LEGAL IMMIGRATION FORMS UNIQUE TO THE IMMIGRANT COMMUNITY, SUCH AS STATUS ADJUSTMENT, WORK AUTHORIZATION, FAMILY REUNIFICATION, AND CITIZENSHIP. IN 2021, WE SERVED 1,410 INDIVIDUALS THROUGH OUR THREE-SITE LEGAL SERVICES PROGRAM. YOUTH SERVICES - IINE-MANCHESTER HAS A FEDERALLY FUNDED YOUTH/PARENT LIAISON THAT SUPPORTS REFUGEE CHILDREN IN PUBLIC SCHOOLS. IN FY2021, IINE PROVIDED INTENSIVE SUPPORT OF FAMILIES AND CHILDREN ENGAGING IN

64

Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND Employer identification number 1NC. Employer identification number 04-2104325

REMOTE LEARNING.

VOLUNTEER PROGRAM - MANCHESTER SITE VOLUNTEERS AND INTERNS PROVIDED

3,459 HOURS OF PROGRAM AND CLIENT SUPPORT. VOLUNTEERS AND INTERNS

SUPPORT CULTURAL ORIENTATION CLASSES, PROVIDE ENGLISH TUTORING, LEAD

VARIOUS WORKSHOPS, ORGANIZE SUPPLY DRIVES, HOST COMMUNITY DINNERS, AND

MORE.

FORM 990, PART VI, SECTION A, LINE 4:

THE INSTITUTE AMENDED ITS BYLAWS TO CHANGE ITS CONFLICT OF INTEREST AND INDEMNIFICATION POLICES TO BE CONSISTENT WITH MASSACHUSETTS LAW, TO UPDATE ITS BOARD COMPOSITION TO BE A MINIMUM OF 3 MEMBERS AND NOT MORE THAN 21 MEMBERS, TO REQUIRE ADVISORY COMMITTEES TO REQUIRE AT LEAST 1 BOARD MEMBER, TO CODIFY THE ROLE OF THE NOMINATING COMMITTEE TO SELECT MEMBERS AND ALLOW THE BOARD TO CREATE OTHER COMMITTEES WITH NON-BOARD MEMBERS TO SERVE ON THE COMMITTEES AS NON-VOTING MEMBERS.

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

THE INSTITUTE'S ACCOUNTING, FINANCE AND REAL ESTATE COMMITTEE REVIEWS THE 990 IN DETAIL UPON COMPLETION BY THE AUDITORS. ONCE REVIEWED AND APPROVED BY MANAGEMENT, THE 990 IS PROVIDED TO THE FULL BOARD OF DIRECTORS BEFORE FILING.

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

THE HIRING PROCESS OR ADDITION OF A BOARD MEMBER REQUIRES DISCLOSURE OF ANY CONFLICT OF INTEREST. THE EMPLOYEE OR BOARD MEMBER SIGNS THE CONFLICT OF INTEREST STATEMENT CONFIRMING THAT THERE IS NO CONFLICT CREATED BY AN EXISTING BUSINESS RELATIONSHIP, THAT THE EMPLOYEE OR BOARD MEMBER AGREES TO AVOID CONFLICTS OF INTEREST IN THE FUTURE, AND IF ONE DOES ARISE, THE

032212 11-20-20

| Schedule O (Form 990 or 990-EZ) 2020                                 | Page 2                                    |
|--|---|
| Name of the organization INTERNATIONAL INSTITUTE OF NEW ENGLAND INC. | Employer identification number 04-2104325 |
| EMPLOYEE OR BOARD MEMBER WILL PROMPTLY DISCLOSE THE CONFL            | ICT TO IINE.                              |
| FORM 990, PART VI, SECTION B, LINE 15A:                              |   |
| COMPENSATION AND EMPLOYEE BENEFITS FOR THE PRESIDENT AND             | CEO ARE DETERMINED                        |
| BY THE INDEPENDENT MEMBERS OF THE BOARD OF DIRECTORS AND             | ARE BASED ON                              |
| PERFORMANCE OBJECTIVES.  |   |
|  |   |
| FORM 990, PART VI, SECTION C, LINE 19:                               |   |
| THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT             | OF INTEREST                               |
| POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC             | UPON REQUEST. THE                         |
| ORGANIZATION'S TAX FILINGS ARE AVAILABLE THROUGH GUIDE ST            | AR AND THE                                |
| MASSACHUSETTS ATTORNEY GENERAL'S WEBSITES.                           |   |
|  |   |
| FORM 990, PART XII, LINE 2C:   |   |
| THE INSTITUTES' ADMINISTRATION, FINANCE AND REAL ESTATE C            | OMMITTEE                                  |
| ASSUMES THE RESPONSIBILITY FOR THE OVERSIGHT OF THE AUDIT            | OR ITS                                    |
| FINANCIAL STATEMENTS AND SELECTION OF THE INDEPENDENT ACC            | OUNTANT.                                  |
|  |   |
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#### Form **8868**

(Rev. January 2020)

Department of the Treasury Internal Revenue Service

## Application for Automatic Extension of Time To File an Exempt Organization Return

File a separate application for each return.

► Go to www.irs.gov/Form8868 for the latest information.

OMB No. 1545-0047

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit <a href="https://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits">www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits</a>.

| filing of th                             | nis form, visit www.irs.gov/e-file-providers/e-file-for-chari  | ties-and-r | non-profits.                           |                                  |   |           |  |
|--|--|------------|--|----------------------------------|---|-----------|--|
| Automa                                   | atic 6-Month Extension of Time. Only subm  | nit origin | al (no copies needed).                 |                                  |   |           |  |
| All corpor                               | rations required to file an income tax return other than Fo  | orm 990-T  | (including 1120-C filers), partnership | ps, REMIC                        | S, and trusts                                     |           |  |
| must use                                 | Form 7004 to request an extension of time to file incom  | e tax retu | rns.                                   |                                  |   |           |  |
|  | I  |            |  |                                  |   |           |  |
| Type or                                  | TAMEDALAMICALAL TALOMITMINE OF AFRICATION  |            |  |                                  | Taxpayer identification number (TIN) $04-2104325$ |           |  |
| print                                    |  |            |  |                                  |   |           |  |
| File by the                              | the the the transfer of the tr |            |  |                                  | 01 2101323  |           |  |
| due date for filing your                 | 2 BOYLSTON STREET, NO. 300   | cc manac   | Alons.                                 |                                  |   |           |  |
| return. See instructions.                | City, town or post office, state, and ZIP code. For a fo   | oreign add | dress, see instructions.               |                                  |   |           |  |
|  | BOSTON, MA 02116   | Ü          |  |                                  |   |           |  |
| Enter the                                | Return Code for the return that this application is for (file  | e a separa | ate application for each return)       |                                  |   | 0 1       |  |
| Applicati                                | on   | Return     | Application                            | ation                            |   |           |  |
| ls For                                   |  | Code       | Is For                                 |                                  |   |           |  |
| Form 990                                 | or Form 990-EZ   | 01         | Form 990-T (corporation)               | corporation)                     |   |           |  |
| Form 990                                 | -BL  | 02         | Form 1041-A                            | orm 1041-A                       |   |           |  |
| Form 4720 (individual)                   |  |            | Form 4720 (other than individual)      | orm 4720 (other than individual) |   |           |  |
| Form 990-PF                              |  |            | Form 5227                              |                                  |   | 10        |  |
| Form 990-T (sec. 401(a) or 408(a) trust) |  |            | Form 6069                              |                                  |   | 11        |  |
| Form 990                                 | -T (trust other than above)  | Form 8870  |  |                                  | 12  |           |  |
|  | CELINE MUKASINI  |            |  | 363                              | 00116   |           |  |
|  | poks are in the care of $\triangleright$ 2 BOYLSTON STRI   | SET,       |  | , MA                             | 02116   |           |  |
|  | none No. ► (617) 695–1688  |            | Fax No.                                |                                  |   |           |  |
|  | organization does not have an office or place of business  |            |  |                                  |   |           |  |
|  | is for a Group Return, enter the organization's four digit   |            |  |                                  |   |           |  |
| box 🕨 📗                                  | . If it is for part of the group, check this box   | and atta   | ach a list with the names and TINs of  | f all memb                       | ers the extension is                              | for.      |  |
| <b>d</b> 1                               | avect on automotic Consorth automotor of time watil  | ATICIT     | QT 15 2022г.                           | . 41                             |   |           |  |
|  | I request an automatic 6-month extension of time until AUGUST 15, 2022 , to file the exempt organization return for the organization return for:   |            |  |                                  |   |           |  |
| une<br>⊾[                                |  | anization  | s return for.                          |                                  |   |           |  |
|  | zalendar year or or X tax year beginning OCT 1, 2020   | an         | nd ending SEP 30, 2021                 |                                  |   |           |  |
|  | tax year beginning   | , ai       |  |                                  | <u> </u>  |           |  |
| 2 If th                                  | ne tax year entered in line 1 is for less than 12 months, c  | heck reas  | son: Initial return                    | Final retur                      | 'n  |           |  |
| - "                                      | Change in accounting period  |            |  |                                  |   |           |  |
| _  |  |            |  |                                  |   |           |  |
| 3a If th                                 | nis application is for Forms 990-BL, 990-PF, 990-T, 4720,  | or 6069.   | enter the tentative tax. less          |                                  |   |           |  |
|  | nonrefundable credits. See instructions.   | 3a         | \$                                     | 0.                               |   |           |  |
|  | If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and  |            |  |                                  |   |           |  |
|  | estimated tax payments made. Include any prior year overpayment allowed as a credit.  3b \$  |            |  |                                  |   |           |  |
|  | ance due. Subtract line 3b from line 3a. Include your pa   |            |  |                                  |   |           |  |
|  | using EFTPS (Electronic Federal Tax Payment System). See instructions.   |            |  |                                  | \$  | 0.        |  |
|  | If you are going to make an electronic funds withdrawal  |            |  | 3453-EO aı                       | nd Form 8879-EO fo                                | r payment |  |
| instructio                               |  |            |  |                                  |   |           |  |

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

Form 8868 (Rev. 1-2020)

LHA