

5. **O-147-24** AN ORDINANCE APPROPRIATING ~~\$1,500~~ 5,000 \$7,000 FROM NEIGHBORHOOD DEVELOPMENT FUNDS IN THE FOLLOWING MANNER: \$1,500 EACH FROM DISTRICTS 2 AND 6; \$750 FROM DISTRICT 3; ~~AND \$500 EACH FROM DISTRICTS 8, 12, 21, AND 24; AND \$250 EACH FROM DISTRICTS 1, 9, 13, 14, AND 17;~~ THROUGH THE OFFICE OF MANAGEMENT AND BUDGET, TO FAMILY SCHOLAR HOUSE, INC. FOR THEIR PACK A BACKPACK BASH PROVIDING SCHOOL SUPPLIES FOR FAMILY SCHOLAR HOUSE SCHOLARS (AS AMENDED).

8/8/24 Metro Council Amended; Passed

7/30/24 Labor, Economic Development, and Appropriations Committee Amended; Recommended for Approval

Enactment #: Ordinance No. 131, Series 2024

**Sponsors:**

ORDINANCE NO. \_\_\_\_\_, SERIES 2024

AN ORDINANCE APPROPRIATING ~~\$1,500~~ ~~\$5,000~~ \$7,000 FROM NEIGHBORHOOD DEVELOPMENT FUNDS IN THE FOLLOWING MANNER: \$1,500 EACH FROM DISTRICTS 2 AND 6; \$750 FROM DISTRICT 3; AND \$500 EACH FROM DISTRICTS 8, 12, 21, AND 24; AND \$250 EACH FROM DISTRICTS 1, 9, 13, 14, AND 17; THROUGH THE OFFICE OF MANAGEMENT AND BUDGET, TO FAMILY SCHOLAR HOUSE, INC. FOR THEIR PACK A BACKPACK BASH PROVIDING SCHOOL SUPPLIES FOR FAMILY SCHOLAR HOUSE SCHOLARS (AS AMENDED).

SPONSORED BY: COUNCIL MEMBERS SHANKLIN, BAKER, RENO-WEBER, BLACKWELL, RUHE, FLOOD, PARRISH-WRIGHT, HAWKINS, OWEN, SEUM, FOWLER, AND PRESIDENT WINKLER

BE IT ORDAINED BY THE LEGISLATIVE COUNCIL OF THE LOUISVILLE/JEFFERSON COUNTY METRO GOVERNMENT ("THE COUNCIL") AS FOLLOWS:

**SECTION I:** The sum of ~~\$1,500~~ ~~\$5,000~~ \$7,000 is hereby appropriated from Neighborhood Development funds in the following manner: \$1,500 each from Districts 2 and 6; \$750 from District 3; and \$500 each from Districts 8, 12, 21, and 24; and \$250 each from Districts 1, 9, 13, 14, and 17; through the Office of Management and Budget, to Family Scholar House, Inc. for their Pack a Backpack Bash providing school supplies for Family Scholar House scholars.

**SECTION II:** The Council has determined the funds requested in this Ordinance will be expended for a public purpose.

**SECTION III:** This grant is subject to the Council's Policies and Procedures as adopted and effective at the date of passage of this Ordinance.

**SECTION IV:** This Ordinance shall take effect upon its passage and approval or otherwise becoming law.

\_\_\_\_\_  
Sonya Harward  
Metro Council Clerk

\_\_\_\_\_  
Markus Winkler  
President of the Council

\_\_\_\_\_  
Craig Greenberg  
Mayor

\_\_\_\_\_  
Approval Date

**APPROVED AS TO FORM AND LEGALITY:**

Michael J. O'Connell  
Jefferson County Attorney

BY: \_\_\_\_\_

O-147-24 Family Scholar House

0-147-24

# **NEIGHBORHOOD DEVELOPMENT FUND Not-for-Profit Transmittal and Approval Form**

**Applicant/Program:** Family Scholar House, Inc. / Pack a Backpack Bash

**Applicant Requested Amount:** \$7,000.00

**Appropriation Request Amount:** ~~\$1,500.00~~ **\$5,000 \$7,000**

## **Executive Summary of Request**

Pack a Backpack Bash: Family Scholar House, Inc. will utilize NDF funds to purchase school supplies for FSH scholars. These funds are critical in providing students with the supplies they need to complete their work inside/outside the classroom. Items include; backpacks, crayons, pens/pencils, colored pencils, paper, notebooks, folders etc. All items will go to a FSH student currently engaged and benefiting from the program.

Is this program/project a fundraiser? -

☐ Yes ☒ No

Is this applicant a faith based organization?

☐ Yes ☒ No

Does this application include funding for sub-grantee(s)?

☐ Yes ☒ No

I have reviewed the attached Neighborhood Development Fund Application and have found it complete and within Metro Council guidelines and request approval of funding in the following amount(s). I have read the organization's statement of public purpose to be furthered by the funds requested and I agree that the public purpose is legitimate. I have also completed the disclosure section below, if required.

2  
District #

Barbara Shankley  
Primary Sponsor Signature

\$1,500  
Amount

06/20/2024  
Date

## **Primary Sponsor Disclosure**

List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

N/A

**Approved by:**

Philip R  
Appropriations Committee Chairman

7-30-24  
Date

Final Appropriations Amount: \$7,000



**Applicant/Program:** Family Scholar House, Inc.

**Pack a Backpack Bash:** Family Scholar House, Inc. will utilize NDF funds to purchase school supplies.

### Additional Disclosure and Signatures

#### Additional Council Office Disclosure

List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

N/A

#### Council Member Signature and Amount

District 1	\$ <u>250</u>
District 2	\$ _____
District 3	\$ <u>750</u>
District 4	\$ _____
District 5	\$ _____
District <u>Phillip Baker</u>	\$ <u>1,500</u>
District 7	\$ _____
District <u>Ben Reno-Weber</u>	\$ <u>500</u>
District 9	\$ <u>250</u>
District 10	\$ _____
District 11	\$ _____
District 1 <u>Rick Blackwell</u>	\$ <u>500</u>
District 13	\$ <u>250</u>
District 14	\$ <u>250</u>
District 15	\$ _____

**Applicant/Program:** *Family Scholar House, Inc.*

**Pack a Backpack Bash:** Family Scholar House, Inc. will utilize NDF funds to purchase school supplies.

### Additional Disclosure and Signatures

#### Additional Council Office Disclosure

List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

N/A

District 16 \_\_\_\_\_ \$ \_\_\_\_\_

District 17 \_\_\_\_\_ \$ *250*

District 18 \_\_\_\_\_ \$ \_\_\_\_\_

District 19 \_\_\_\_\_ \$ \_\_\_\_\_

District 20 \_\_\_\_\_ \$ \_\_\_\_\_

District 2 *Betsy Kulev* \_\_\_\_\_ \$ *500*

District 22 \_\_\_\_\_ \$ \_\_\_\_\_

District 23 \_\_\_\_\_ \$ \_\_\_\_\_

District 2 *Madonna Flood* \_\_\_\_\_ \$ *500*

District 25 \_\_\_\_\_ \$ \_\_\_\_\_

District 26 \_\_\_\_\_ \$ \_\_\_\_\_

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

**Legal Name of Applicant Organization** Family Scholar House, Inc.

**Program Name and Request Amount** Pack a Backpack Bash / \$7,000

	Yes/No/NA
Is the NDF Transmittal Sheet Signed by all Council Member(s) Appropriating Funding?	<input checked="" type="checkbox"/> Yes
Is the funding proposed by Council Member(s) less than or equal to the request amount?	<input checked="" type="checkbox"/> Yes
Is the proposed public purpose of the program viable and well-documented?	<input checked="" type="checkbox"/> Yes
Will all of the funding go to programs specific to Louisville/Jefferson County?	<input checked="" type="checkbox"/> Yes
Has Council or Staff relationship to the Agency been adequately disclosed on the cover sheet?	<input type="checkbox"/> N/A
Has prior Metro Funds committed/granted been disclosed?	<input checked="" type="checkbox"/> Yes
Is the application properly signed and dated by authorized signatory?	<input checked="" type="checkbox"/> Yes
Is proof of Tax Exempt status of 501(c) 3, 4, 6, 19, 1120-H included?	<input checked="" type="checkbox"/> Yes
If Metro funding is for a separate taxing district is the funding appropriated for a program outside the legal responsibility of that taxing district?	<input type="checkbox"/> N/A
Is the entity in good standing with: <ul style="list-style-type: none"> <li>▶ Kentucky Secretary of State?</li> <li>▶ Louisville Metro Revenue Commission?</li> <li>▶ Louisville Metro Government?</li> <li>▶ Internal Revenue Service?</li> <li>▶ Louisville Metro Human Relations Commission?</li> </ul>	<input checked="" type="checkbox"/> Yes
Is the current Fiscal Year Budget included?	<input checked="" type="checkbox"/> Yes
Is the entity's board member list (with term length/term limits) included?	<input checked="" type="checkbox"/> Yes
Is recommended funding less than 33% of total agency operating budget?	<input checked="" type="checkbox"/> Yes
Does the application budget reflect only the revenue and expenses of the project/program?	<input checked="" type="checkbox"/> Yes
Is the cost estimate(s) from proposed vendor (if request is for capital expense) included?	<input type="checkbox"/> N/A
Is the most recent annual audit (if required by organization) included?	<input type="checkbox"/> N/A
Is a copy of Signed Lease (if rent costs are requested) included?	<input type="checkbox"/> N/A
Is the Supplemental Questionnaire for churches/religious organizations (if requesting organization is faith-based) included?	<input type="checkbox"/> N/A
Are the Articles of Incorporation of the Agency included?	<input checked="" type="checkbox"/> Yes
Is the IRS Form W-9 included?	<input checked="" type="checkbox"/> Yes
Is the IRS Form 990 included?	<input checked="" type="checkbox"/> Yes
Are the evaluation forms (if program participants are given evaluation forms) included?	<input type="checkbox"/> N/A
Affirmative Action/Equal Employment Opportunity plan and/or policy statement included (if required to do so)?	<input type="checkbox"/> N/A
Has the Agency agreed to participate in the BBB Charity review program? If so, has the applicant met the BBB Charity Review Standards?	<input checked="" type="checkbox"/> No <i>Yes</i>
Prepared by: Caleb Howard	Date: 06/20/2024

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 1 – APPLICANT INFORMATION			
Legal Name of Applicant Organization:			
(as listed on: <a href="http://www.sos.ky.gov/business/records">http://www.sos.ky.gov/business/records</a> ) Family Scholar House			
Main Office Street & Mailing Address: 403 Reg Smith Circle, Louisville, KY 40208			
Website: <a href="http://www.familyscholarhouse.org">www.familyscholarhouse.org</a>			
Applicant Contact:	Deja Jackson	Title:	Director of Community
Phone:	2707795828	Email:	<a href="mailto:djackson@familyscholarhouse.org">djackson@familyscholarhouse.org</a>
Financial Contact:	Mary Beth Norton	Title:	Director of Business
Phone:	502.813.3081	Email:	<a href="mailto:mbnorton@familyscholarhouse.org">mbnorton@familyscholarhouse.org</a>
Organization's Representative who attended NDF Training: Deja Jackson			
GEOGRAPHICAL AREA(S) WHERE PROGRAM ACTIVITIES ARE (WILL BE) PROVIDED			
Program Facility Location(s):	Louisville, Kentucky (see attached page)		
Council District(s):	6, 4, 1, 15,	Zip Code(s):	40211, 40208, 40216, 40203, 40217
SECTION 2 – PROGRAM REQUEST & FINANCIAL INFORMATION			
PROGRAM/PROJECT NAME: Pack a Backpack Bash			
Total Request: (\$)	7,000	Total Metro Award (this program) in previous year: (\$)	0
Purpose of Request (check all that apply):			
<input type="checkbox"/> Operating Funds (generally cannot exceed 33% of agency's total operating budget)			
<input checked="" type="checkbox"/> Programming/services/events for direct benefit to community or qualified individuals			
<input type="checkbox"/> Capital Project of the organization (equipment, furnishing, building, etc)			
The Following are Required Attachments:			
<input checked="" type="checkbox"/> IRS Exempt Status Determination Letter <input checked="" type="checkbox"/> Current year projected budget <input checked="" type="checkbox"/> Current financial statement <input checked="" type="checkbox"/> Most recent IRS Form 990 or 1120-H <input checked="" type="checkbox"/> Articles of Incorporation (current & signed) <input type="checkbox"/> Cost estimates from proposed vendor if request is for capital expense		<input type="checkbox"/> Signed lease if rent costs are being requested <input checked="" type="checkbox"/> IRS Form W9 <input type="checkbox"/> Evaluation forms if used in the proposed program <input checked="" type="checkbox"/> Annual audit (if required by organization) <input type="checkbox"/> Faith Based Organization Certification Form, if applicable	
For the current fiscal year ending June 30, list all funds appropriated and/or received from Louisville Metro Government for this or any other program or expense, including funds received through Metro Federal Grants, from any department or Metro Council Appropriation (Neighborhood Development Funds). Attach additional sheet if necessary.			
Source:	CDBG	Amount: (\$)	\$ 87,500.00
Source:		Amount: (\$)	
Source:		Amount: (\$)	
Has the applicant contacted the BBB Charity Review for participation? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
Has the applicant met the BBB Charity Review Standards? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

## Application, Section I

**Applicant Contact:** Deja Jackson [DJackson@familyScholarHouse.org](mailto:DJackson@familyScholarHouse.org)

**Financial Contact:** MaryBeth Norton [MBNorton@FamilyScholarHouse.org](mailto:MBNorton@FamilyScholarHouse.org)

**Project Locations:**

403 Reg Smith Cr. 40208 – LSH

118 W. Breckenridge St. 40202 – DSH

2301 Bradley Ave 40217– SJSH

1309 Catalpa St 40211– PSH

3311 Cathe Dykstra Way 40216 – RSH

**Zip Codes:**

40211, 40208, 40216, 40203, 40217

~~**Section 8 Email:** [CDykstra@FamilyScholarHouse.org](mailto:CDykstra@FamilyScholarHouse.org)~~

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

### SECTION 3 – AGENCY DETAILS

#### Describe Agency's Vision, Mission and Services:

The mission of Family Scholar House is to end the cycle of poverty and transform our community by empowering families and youth to succeed in education and achieve life-long self-sufficiency. Family Scholar House programs and services are designed to address the specific needs of underserved populations, specifically students, student parents, single parents, foster alumni, and other vulnerable populations. We serve disadvantaged residential and nonresidential. foster alumni and single parents and their children with a comprehensive, holistic continuum of care. Our residential families have experienced poverty, unstable housing, and, 95% are survivors of domestic violence. 279 families live on one of our 5 Louisville-area campuses, as they prepare for careers by getting the education they need for the workforce.

FSH provides a comprehensive continuum of services to address any barrier our participants face in continuing their education, achieving career-track employment and attaining self-sufficiency. The student parents in our program face many barriers to continuing their education as a way to permanently break the cycle of poverty, including lack of childcare, lack of affordable housing, lack of transportation; unemployment or underemployment; rising costs of post-secondary education, and lack of family support systems. We address these barriers by providing comprehensive programming to meet immediate needs and develop strategies for long-term success, including academic advising, financial literacy education and case management for single- parent families. The resources we provide aid participants in several ways, including emergency assistance; case management; academic advising; tutors for children and parents; educational workshops for children and parents; mentoring; and financial assistance for childcare, transportation etc. Intensive programming provides: family support services and counseling for personal growth in areas of parenting, financial decision-making skills and other areas specific to each family's need, guidance and knowledge in pursuing their educational goals, and peer support to strengthen their commitment to educational and economic success. Through monthly case management sessions, participants receive support in many areas, including budgeting education.

Our scholars have earned 870 credentials to date. 114 have continued on to buy their own homes. 99% of graduates have exited to stable housing. 77% have exited to full-time employment with 78% experiencing an immediate increase in income.

**LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION**

## SECTION 4 - BOARD OF DIRECTORS AND PAID STAFF

[illegible]

**Describe the Board term limit policy:**

Our board serves two, three year terms.

Three Highest Paid Staff Names	Annual Salary
Cathe Dykstra	\$ 386,198.65
Kate Brackett	\$ 150,000.00
Sarah Brady	\$ 125,000.00

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

### SECTION 5 – PROGRAM/PROJECT NARRATIVE

**A: Describe the program/project start and end dates, a description of the program/project and applicable data with regards to specific client population the program will address (attach related flyers, planning minutes, designs, event permits, proposals for services/goods, etc.):**

Every year we provide school supplies for our scholars, from our school age to our adult learners. This is an opportunity to get everyone excited about getting back into the school routine. We ensure our scholars of all ages have the materials they need to be successful inside the classroom. From a backpack, to pencils and crayons we want our young scholars to walk confidently into a new school year prepared and ready to learn. This year we'll distribute supplies the week before school starts for our school aged students. Events will take place July 29th - August 9th, 2024 at each of our 5 Louisville area campuses. We'll have volunteers prepare the items on our campuses and have volunteers assist our kids in picking out their supplies. This opportunity will ensure 343 families receive school supplies - our residential families and our pre-residential participants. Pre-residential families are those currently engaged in our program and receiving supportive services, however not living on campus.

**B: Describe specifically how the funding will be spent including identification of funding to sub grantee(s):**

All funds will be utilized to purchase school supplies for our scholars. These supplies are critical in providing our scholars with the supplies they need to complete their work inside and outside the classroom. Items include; Crayons, Markers/Sharpees, Glue Sticks, Wood and mechanical Pencils, Pencil Boxes, Wide Rule 1 Subject, Wide Ruled Loose Leaf, Color Pencils, Black Pens, 1in binders, index cards blue pens, 2 pocket folders, highlighters, plastic dividers, Agendas, kleenex, hand sanitizer, printer paper ti85 calculators, desk/wall calendars, dry erase markers, backpacks, 5 subject notebooks, 3 subject notebooks, Rulers, Sticky Notes and paper clips. We will ensure our scholars have the correct items for their specific program and as requested by their schools. All items will go to an FSH student currently engaged and benefiting from the program.



## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

**C: If this request is a fundraiser, please detail how the proceeds will be spent:**

N/A

**D: For Expenditure Reimbursement Only** – The grant award period begins with the Metro Council approval date and ends on June 30 of Metro fiscal year in which the grant is approved. If any part of this funding request is for funds to be spent before the grant award period, identify the applicable circumstances:

- ☒ The funding request is a reimbursement of the following expenditures that will probably be incurred after the application date, but prior to the execution of the grant agreement:
- ✓ If selecting this option, the invoice, receipt and payment documentation should not be available as of the date of this application.

The Grantee will be required to submit financial reporting in accordance with the reporting schedule provided in the grant agreement.

Our organization is requesting to be reimbursed for school supplies that we may purchase after the 6/15/24 NDF Application date but prior to the execution of the NDF Grant Agreement. The Pack a Backpack Bash event goes from 7/29/24 through 8/9/2024.

- ☐ Reimbursements should not be made before application date unless an emergency can be demonstrated by the primary council sponsor. The funding request is a reimbursement of the following expenditures (attach invoices or proof of payment):
- ✓ Attach a copy of invoices and/or receipts to provide proof of purchase of activities associated with the work plan identified in this application.
  - ✓ Attach a copy of cancelled checks to provide proof of payment of the invoices or receipts associated with the work plan identified in this application.

N/A

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

**E: Describe the program's benefits to those being served (measurable outcomes). Include the program's process for collecting data and the indicators that will be tracked to measure the benefits to those being served:**

When our scholars are prepared for school, they have all the necessary materials to start the school year on equal footing. It alleviates the financial strain on our families who are focused on attending school full-time themselves to create a better life for their children. Most of our families lack extra cash for additional expenses and these supplies relieve stress from our families. Being prepared often leads to improved academic performance and engagement because they can focus on the material instead of falling behind. This program also fosters a sense of community. Our participants repeat their appreciation for the community support, so these donations really emphasize that.

**F: Briefly describe any existing collaborative relationships the organization has with other community organizations. Describe what those partners are bringing to the relationship in general and to this program/project specifically.**

We currently have an amazing group, Car Keys Express, who will bring 15 volunteers to sort and organize the donations in preparation for the Pack a Backpack Bash. We also have Humana bringing 8 volunteers for a cookout to celebrate our Pack a Backpack event at our Stoddard Johnson Scholar House Campus for after-work hours. This ensures our families regardless of their work/school schedule are able to access the supplies they need.

# LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

## SECTION 6 – PROGRAM/PROJECT BUDGET SUMMARY

THE PROGRAM/PROJECT BUDGET SHOULD REALISTICALLY ESTIMATE WHAT AMOUNT IS NEEDED FROM METRO GOVERNMENT AND WHAT IS EXPECTED FROM OTHER SOURCES.

Program/Project Expenses	Column 1	Column 2	Column (1+2)=3
	Proposed Metro Funds	Non- Metro Funds	Total Funds
A: Personnel Costs Including Benefits			0
B: Rent/Utilities			0
C: Office Supplies			0
D: Telephone			0
E: In-town Travel			0
F: Client Assistance (See Detailed List on Page 8)			0
G: Professional Service Contracts			0
H: Program Materials	7000	\$ 3,000.00	\$ 10,000.00
I: Community Events & Festivals (See Detailed List on Page 8)			0
J: Machinery & Equipment			0
K: Capital Project			0
L: Other Expenses (See Detailed List on Page 8)			0
<b>*TOTAL PROGRAM/PROJECT FUNDS</b>	\$ 7,000.00	\$ 3,000.00	\$ 10,000.00
% of Program Budget	70.00%	30.00%	100%

List funding sources for total program/project costs in Column 2, Non-Metro Funds:

Other State, Federal or Local Government	0	
United Way	0	
Private Contributions (do not include individual donor names)	<del>\$ 3,100.00</del>	\$3,000
Fees Collected from Program Participants	0	
Other (please specify)	0	
Total Revenue for Columns 2 Expenses **	\$ 3,100.00	\$3,000

\*Total of Column 1 MUST match "Total Request on Page 1, Section 2"

\*\*Must equal or exceed total in column 2.

# LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

Detail for Client Assistance, Community Events & Festivals or Other Expenses shown on Page 7 (circle one and use multiple sheets if necessary)	Column 1	Column 2	Column (1 + 2)=3
	Proposed Metro Funds	Non- Metro Funds	Total Funds
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
<b>Total</b>	\$ 0.00	\$ 0.00	\$ 0.00

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

**Detail of In-Kind Contributions for this PROGRAM only:** Includes Volunteers, Space, Utilities, etc. (Include anything not bought with cash revenues of the agency).

Donor*/Type of Contribution	Value of Contribution	Method of Valuation
Volunteers for Preparation	\$675	\$15/hour
Humana Volunteers for Cookout	\$240	\$15/hour
Food cost	\$1000	\$17/household
<i>Total Value of In-Kind</i> <i>(to match Program Budget Line Item.</i> Volunteer Contribution & Other In Kind)	1915	

**\* DONOR INFORMATION REFERS TO WHO MADE THE IN KIND CONTRIBUTION. VOLUNTEERS NEED NOT BE LISTED INDIVIDUALLY, BUT GROUPED TOGETHER ON ONE LINE AS A TOTAL NOTING HOW MANY HOURS PER PERSON PER WEEK**

**Agency Fiscal Year Start Date:** 01/01/2024

**Does your Agency anticipate a significant increase or decrease in your budget from the current fiscal year to the budget projected for next fiscal year?** NO ☒ YES ☐

**If YES, please explain:**

## LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

### SECTION 7 – CERTIFICATIONS & ASSURANCES

By signing Section 7 of the Grant Application, the authorized official signing for the applicant organization certifies and assures to the best of his or her knowledge and/or belief the following Assurances and Certifications. If there is any reason why one or more of the assurances or certifications listed cannot be certified or assured, please explain in writing and attach to this application.

#### Standard Assurances

1. Applicant understands this application and its attachments as well as any resulting grant agreement, reports and proof of expenditure is subject to Kentucky's open records law.
2. Applicant understands if the grant agreement is not returned to Louisville Metro within 90 days of its mailing to the applicant, the approval is automatically revoked and the funds will not be disbursed to our organization.
3. Applicant and any sub grantee will give Louisville Metro Government access to and the right to examine all paper or electronic records related to the awarded grant for up to five years of the grant agreement date.
4. Applicant assures compliance with the grant requirements and will monitor the performance of any third party (sub-grantee).
5. The Agency is in good standing with the Kentucky Secretary of State, Louisville Metro Government, the Jefferson County Revenue Commission, the Internal Revenue Service, and the Louisville Metro Human Relations Commission.
6. Applicant understands failure to provide the services, programs, or projects included in the agreement will result in funds being withheld or requested to be returned if previously disbursed.
7. Applicant understands they must return to Louisville Metro any unexpended funds by July 31 following the Metro Louisville's fiscal year end.
8. Applicant understands they must provide proof of all expenditures (canceled checks, receipts, paid invoices). The Applicant understands the failure to provide proof of expenditures as required in the grant agreement could result in funding being withheld or request to be returned if previously disbursed.
9. Applicant understands if this application is approved, the grant agreement will identify an award period that begins with the Metro Council approval date, and will end with June 30 of the fiscal year in which the grant is approved. Expenditures associated with this award expected to occur prior to the award period (approval date) must be disclosed in this application in order to be considered compliant with the grant agreement.
10. Applicant understands if we choose to incur expenditures prior to the approval of the application by the Metro Council, there is no guarantee that funding will be reimbursed, as the Council may choose not to award the application.
11. Applicant will establish safeguards to prohibit employees or any person that receives compensation from awarded funds from using their position for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

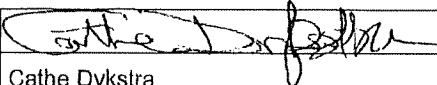
#### Standard Certifications

1. The Agency certifies it will not use Louisville Metro Government funds for any religious, political or fraternal activities.
2. The Agency has a written Affirmative Action/Equal Opportunity Policy.
3. The Agency does not discriminate in employment or in provision of any service/program/activity/event based on age, color, disabled status, national origin, race, religion, sex, gender identity or sexual orientation, or Vietnam era veteran status.
4. The Agency certifies it will not require clients, recipients, or beneficiaries to participate in religious, political, fraternal or like activities in order to receive services/benefits provided with Louisville Metro Government funds.
5. The Agency understands the Americans with Disabilities Act (ADA) and makes reasonable accommodations.

**Relationship Disclosure:** List below any relationship you or any member of your Board of Directors or employees has with any Councilperson, Councilperson's family, Councilperson's staff or any Louisville Metro Government employee.

### SECTION 8 – CERTIFICATIONS & ASSURANCES

I certify under the penalty of law the information in this application (including, without limitation, "Certifications and Assurances") is accurate to the best of my knowledge. I am aware my organization will not be eligible for funding if investigation at any time shows falsification. If falsification is shown after funding has been approved, any allocations already received and expended are subject to be repaid. I further certify that I am legally authorized to sign this application for the applying organization and have initialed each page of the application.

Signature of Legal Signatory:		Date:	06/15/2024
Legal Signatory: (please print):	Cathe Dykstra	Title:	CEO
Phone:	(502) 584-8090	Extension:	
Email:	Cdykstra@FamilyScholarHouse.org		



OGDEN UT 84201-0046

In reply refer to: 0423235246  
Nov. 14, 2008 LTR 252C 0  
61-1285124 000000 00 000  
00003266  
BODC: TE

FAMILY SCHOLAR HOUSE INC  
% CATHE DYKSTRA  
806 E CHESTNUT STREET  
LOUISVILLE KY 40204-6019996

15426

Taxpayer Identification Number: 61-1285124

Dear Taxpayer:

Thank you for the inquiry dated Sep. 08, 2008.

We have changed the name on your account as requested. The number shown above is valid for use on all tax documents.

If you have any questions, please call us toll free at 1-877-829-5500.

If you prefer, you may write to us at the address shown at the top of the first page of this letter.

Whenever you write, please include this letter and, in the spaces below, give us your telephone number with the hours we can reach you. Also, you may want to keep a copy of this letter for your records.

Telephone Number ( ) \_\_\_\_\_ Hours \_\_\_\_\_

Sincerely yours,

*Karen E. Peat*

Karen E. Peat  
Dept. Manager, Code & Edit/Entity 3

Enclosure(s):  
Copy of this letter

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

OCT 19 2000

PROJECT WOMEN INC  
806 E CHESTNUT ST  
LOUISVILLE, KY 40204-0000

Employer Identification Number:

61-1285124

DLN:

17053267765020

Contact Person:

DAVID V SCIAN

ID# 31369

Contact Telephone Number:

(877) 829-5500

Our Letter Dated:

October 1996

Addendum Applies:

No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1050 (DO/CG)



PROJECT WOMEN INC

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

We have sent a copy of this letter to your representative as indicated in your power of attorney.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

Steven T. Miller  
Steven T. Miller  
Director, Exempt Organizations

# Family Scholar Hou

## Budget Overview: 2024 FY Budget Q

January - December 2024

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024
<b>Revenue</b>					
<b>400 Unrestricted Donations &amp; Grants</b>					
401.1 Donation Income	63,334.00	63,334.00	63,334.00	63,334.00	63,334.00
401.11 Uncollectible Income	0.00	0.00	0.00	0.00	0.00
<b>Total 401.1 Donation Income</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>
401.2 Unfulfilled Pledge - FR & PR	0.00	0.00	0.00	0.00	0.00
401.4 CC Donation Fee Expense	-208.33	-208.33	-208.33	-208.33	-208.33
<b>410 Grant Income - Unrestricted</b>	<b>6,467.40</b>	<b>6,467.40</b>	<b>6,467.40</b>	<b>6,467.40</b>	<b>6,467.40</b>
410.1 PHA Grant	133,333.00	133,333.00	133,333.00	133,333.00	133,333.00
410.2 Government Grants	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00
410.3 Unrestricted Grant Income	8,333.33	8,333.33	8,333.33	8,333.33	8,333.33
<b>Total 400 Unrestricted Donations &amp; Grants</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>
<b>402 Restricted Donations &amp; Grants</b>					
401.12 Restricted Donations	0.00	0.00	0.00	0.00	0.00
401.13 State Budget Appropriation	0.00	0.00	0.00	0.00	0.00
<b>453 Grant Income - Restricted</b>					
<b>453 FSH Restricted Donations &amp; Grants Income-restricted</b>	<b>313,741.00</b>	<b>313,741.00</b>	<b>313,741.00</b>	<b>313,741.00</b>	<b>313,741.00</b>
<b>Total 453 Grant Income - Restricted</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>
<b>Total 402 Restricted Donations &amp; Grants</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>
<b>404 In Kind Donations/Services</b>	<b>625.00</b>	<b>625.00</b>	<b>625.00</b>	<b>625.00</b>	<b>625.00</b>
<b>450 Building Fund</b>	<b>50,000.00</b>	<b>50,000.00</b>	<b>50,000.00</b>	<b>50,000.00</b>	<b>50,000.00</b>
<b>470 Other Income (Loss)</b>	<b>83.33</b>	<b>83.33</b>	<b>83.33</b>	<b>83.33</b>	<b>83.33</b>
<b>471 Program Services</b>	<b>8,760.00</b>	<b>8,760.00</b>	<b>8,760.00</b>	<b>8,760.00</b>	<b>8,760.00</b>
<b>471a Kiosk Services</b>	<b>10,823.33</b>	<b>10,823.33</b>	<b>10,823.33</b>	<b>10,823.33</b>	<b>10,823.33</b>
<b>Total 471 Program Services</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>
<b>473 Gala</b>					
<b>473a Gala Event Income</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

473b Gala Event Expense	0.00	0.00	0.00	0.00	0.00	0.00
Total 473 Gala	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
476 Special Events						
477 Wine, Women & Shoes						
477a WW & S Tickets & Sponsorships	0.00	0.00	535,000.00	0.00	0.00	0.00
477e Wine, Women & Shoes Expenses	0.00	0.00	-160,000.00	0.00	0.00	0.00
Total 477 Wine, Women & Shoes	\$ 0.00	\$ 0.00	\$ 375,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Total 476 Special Events	\$ 0.00	\$ 0.00	\$ 375,000.00	\$ 0.00	\$ 0.00	\$ 0.00
480 Interest Income	958.00	958.33	958.33	958.33	958.33	958.33
481 Investment fees	-125.00	-125.00	-125.00	-125.00	-125.00	-125.00
Total 480 Interest Income	\$ 833.00	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33
498 Change to Restricted Net Assets	-41,667.00	-41,667.00	-41,667.00	-41,667.00	-41,667.00	-41,667.00
499 Scheduled Release from Reserves	41,666.67	41,666.67	41,666.67	41,666.67	41,666.67	41,666.67
Billable Expenditure Revenue	0.00	0.00	0.00	0.00	0.00	0.00
Billable Expense Income	0.00	0.00	0.00	0.00	0.00	0.00
Billable Expense Income ( 450 )	0.00	0.00	0.00	0.00	0.00	0.00
Billable Expense Income-1	0.00	0.00	0.00	0.00	0.00	0.00
Markup	0.00	0.00	0.00	0.00	0.00	0.00
Sales	0.00	0.00	0.00	0.00	0.00	0.00
Sales of Product Income	0.00	0.00	0.00	0.00	0.00	0.00
Sales of Product Revenue	0.00	0.00	0.00	0.00	0.00	0.00
Unapplied Cash Payment Income	0.00	0.00	0.00	0.00	0.00	0.00
Uncategorized Income	0.00	0.00	0.00	0.00	0.00	0.00
Uncategorized Income ( 459 )	0.00	0.00	0.00	0.00	0.00	0.00
Uncategorized Income-1	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue	\$ 646,124.73	\$ 646,125.06	\$ 1,021,125.06	\$ 646,125.06	\$ 646,125.06	\$ 646,125.06
Cost of Goods Sold						
500 FSH Contributions	0.00	0.00	0.00	0.00	0.00	0.00
50000 Cost of Goods Sold	0.00	0.00	0.00	0.00	0.00	0.00
Total Cost of Goods Sold	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Gross Profit	\$ 646,124.73	\$ 646,125.06	\$ 1,021,125.06	\$ 646,125.06	\$ 646,125.06	\$ 646,125.06
Expenditures						
637 Telecom-G&A	1,458.33	1,458.33	1,458.33	1,458.33	1,458.33	1,458.33

[illegible]







Total 900 Building Project	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00
		11,250.00		11,250.00		11,250.00		11,250.00		11,250.00
905 Capitalize FF&E										
Total Expenditures	\$	804,333.36	\$	804,332.86	\$	804,332.86	\$	804,332.86	\$	804,332.86
Net Operating Revenue	-\$	158,208.63	-\$	158,207.80	\$	216,792.20	-\$	158,207.80	-\$	158,207.80
Net Revenue	-\$	158,208.63	-\$	158,207.80	\$	216,792.20	-\$	158,207.80	-\$	158,207.80



63,334.00	63,334.00	63,334.00	63,334.00	63,334.00	63,330.00	63,330.00	760,000.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,334.00</b>	<b>\$ 63,330.00</b>	<b>\$ 63,330.00</b>	<b>\$ 760,000.00</b>	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
-208.33	-208.33	-208.33	-208.33	-208.33	-208.33	-208.33	-2,499.96	
6,467.40	6,467.40	6,467.40	6,467.40	6,467.40	6,467.40	6,467.40	77,608.80	
133,333.00	133,333.00	133,333.00	133,333.00	133,333.00	133,333.00	133,337.00	1,600,000.00	
50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	600,000.00	
8,333.33	8,333.33	8,333.33	8,333.33	8,333.33	8,333.33	8,333.33	99,999.96	
<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,259.40</b>	<b>\$ 261,255.40</b>	<b>\$ 261,259.40</b>	<b>\$ 3,135,108.80</b>	
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	1,000,000.00	0.00	0.00	0.00	0.00	0.00	1,000,000.00	0.00
313,741.00	313,741.00	313,741.00	313,741.00	313,741.00	313,741.00	313,741.00	3,764,892.00	
<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 3,764,892.00</b>	
<b>\$ 313,741.00</b>	<b>\$ 1,313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 313,741.00</b>	<b>\$ 4,764,892.00</b>	
625.00	625.00	625.00	625.00	625.00	625.00	625.00	7,500.00	
50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	600,000.00	
83.33	83.33	83.33	83.33	83.33	83.33	83.33	999.96	
8,760.00	8,760.00	8,760.00	8,760.00	8,760.00	8,760.00	8,760.00	105,120.00	
10,823.33	10,823.33	10,823.33	10,823.33	10,823.33	10,823.33	10,823.33	129,879.96	
<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 19,583.33</b>	<b>\$ 234,999.96</b>	
0.00	0.00	0.00	62,000.00	0.00	0.00	0.00	62,000.00	0.00

[illegible]



\$ 327,242.22	\$ 327,242.22	\$ 327,242.22	\$ 327,242.22	\$ 327,242.22	\$ 327,242.22	\$ 327,242.22	\$ 3,926,906.64
20,740.67	20,740.67	20,740.67	20,740.67	20,740.67	20,740.67	20,740.67	0.00
10,181.77	10,181.77	10,181.77	10,181.77	10,181.77	10,181.77	10,181.77	248,888.04
4,525.25	4,525.25	4,525.25	4,525.25	4,525.25	4,525.25	4,525.25	122,181.24
28,469.04	28,469.04	28,469.04	28,469.04	28,469.04	28,469.04	28,469.04	54,303.00
\$ 63,916.73	\$ 63,916.73	\$ 63,916.73	\$ 63,916.73	\$ 63,916.73	\$ 63,916.73	\$ 63,916.73	341,628.48
13,224.33	13,224.33	13,224.33	13,224.33	13,224.33	13,224.33	13,224.33	0.00
308.00	308.00	308.00	308.00	308.00	308.00	308.00	158,691.96
5,179.95	5,179.95	5,179.95	5,179.95	5,179.95	5,179.95	5,179.95	3,696.00
37.72	37.72	37.72	37.72	37.72	37.72	37.72	62,159.40
\$ 18,750.00	\$ 18,750.00	\$ 18,750.00	\$ 18,750.00	\$ 18,750.00	\$ 18,750.00	\$ 18,750.00	452.64
1,041.67	1,041.67	1,041.67	1,041.67	1,041.67	1,041.67	1,041.67	225,000.00
17,120.01	17,120.01	17,120.01	17,120.01	17,120.01	17,120.01	17,120.01	12,500.04
1,511.66	1,511.66	1,511.66	1,511.66	1,511.66	1,511.66	1,511.66	0.00
678.47	678.47	678.47	678.47	678.47	678.47	678.47	205,440.12
12,000.10	12,000.10	12,000.10	12,000.10	12,000.10	12,000.10	12,000.10	18,139.92
7,404.80	7,404.80	7,404.80	7,404.80	7,404.80	7,404.80	7,404.80	8,141.64
1,701.63	1,701.63	1,701.63	1,701.63	1,701.63	1,701.63	1,701.63	144,001.20
\$ 40,416.67	\$ 40,416.67	\$ 40,416.67	\$ 40,416.67	\$ 40,416.67	\$ 40,416.67	\$ 40,416.67	88,857.60
16,428.99	16,428.99	16,428.99	16,428.99	16,428.99	16,428.99	16,428.99	20,419.56
7,529.67	7,529.67	7,529.67	7,529.67	7,529.67	7,529.67	7,529.67	0.00
573.03	573.03	573.03	573.03	573.03	573.03	573.03	197,147.88
534.50	534.50	534.50	534.50	534.50	534.50	534.50	90,356.04
2,223.37	2,223.37	2,223.37	2,223.37	2,223.37	2,223.37	2,223.37	6,876.36
16,460.42	16,460.42	16,460.42	16,460.42	16,460.42	16,460.42	16,460.42	6,414.00
\$ 43,749.98	\$ 43,749.98	\$ 43,749.98	\$ 43,749.98	\$ 43,749.98	\$ 43,749.98	\$ 43,749.98	26,680.44
3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	3,750.00	197,525.04
1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	45,000.00
11,250.00	11,250.00	11,250.00	11,250.00	11,250.00	11,250.00	11,250.00	15,000.00
10,416.67	10,416.67	10,416.67	10,416.67	10,416.67	10,416.67	10,416.67	135,000.00
							125,000.04





\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	50,000.00	\$	600,000.00
	11,250.00		11,250.00		11,250.00		11,250.00		11,250.00		11,250.00		11,250.00		11,250.00		135,000.00
\$	804,332.86	\$	804,332.86	\$	804,332.86	\$	804,332.86	\$	804,330.86	\$	804,330.86	\$	804,330.78	\$	804,330.78	\$	9,651,988.74
-\$	158,207.80	\$	841,792.20	-\$	158,207.80	-\$	108,207.80	-\$	158,205.80	-\$	158,209.80	-\$	158,205.72	-\$	473,492.35		
-\$	158,207.80	\$	841,792.20	-\$	158,207.80	-\$	108,207.80	-\$	158,205.80	-\$	158,209.80	-\$	158,205.72	-\$	473,492.35		

- Accrual Basis

	Approved2024 Budget	QB Review
Income		
400/402 Revenue Without and Without Donor Restrictions	\$ 7,900,000.00	\$ 7,900,000.80
404- In Kind Donations/Services	\$ 7,500.00	\$7,500
450-Building Fund	\$ 600,000.00	\$ 600,000.00
470- Oher Income (loss)	\$ 1,000.00	\$ 999.96
471-Program Services	\$ 235,000.00	\$ 234,999.96
473- Gala	\$ 50,000.00	\$ 50,000.00
476- Special Events	\$ 375,000.00	\$ 375,000.00
480-Interest Income	\$ 10,000.00	\$ 9,999.63
Scheduled Release from Reserves	\$ 500,000.00	\$ 500,000.00
637-Telecom- G&A	\$ 17,500	\$ 17,499.96
653-Staff Salaries- G&A	\$ 175,236	\$ 174,236.04
654-Payroll Taxes-G&A	\$ 20,000	\$ 20,000.04
655- Facility Maintenance-G&A	\$ 15,000	\$ 15,000.00
656- Accounting and Legal- G&A	\$ 195,000	\$ 195,000.00
662-Staff Benefits	\$ 75,000	\$ 75,000.60
664-Miscellaneous	\$ 100	\$ 99.96
666-Office Supplies- G&A	\$ 5,500	\$ 5,499.96
667-Postage- G&A	\$ 1,350	\$ 1,350.00
680- Mlage and Parking G&A	\$ 4,500	\$ 4,500.00
681-Utilities-G&A	\$ 9,750	\$ 9,750.00
686 Insurance D&O Gen Liab	\$ 65,000	\$ 65,000.04



687 Insurance worker's Comp-G&A	\$	15,000	\$	15,000.00
704-Staff Salaries Program	\$	3,926,907	\$	3,926,906.64
709-Americorps/Contract Services	\$	767,000	\$	767,000.76
724-Training & Related Travel-PRO	\$	225,000	\$	225,000.00
725-Executive Education	\$	12,500	\$	12,500.04
726-Participant Needs-PRO	\$	485,000	\$	485,000.04
729-PR Taxes-Program	\$	525,000	\$	524,999.76
731-Hospitality/Appctn Gifts-Pro	\$	45,000	\$	45,000.00
735-Dues Membership	\$	15,000	\$	15,000.00
737-Telecom-Program	\$	135,000	\$	135,000.00
755-Facility Maintenance- Program	\$	125,000	\$	125,000.04
760-Program Publication and Awareness	\$	375,000	\$	375,000.24
761-Events-Program	\$	30,000	\$	30,000.00
762-Staff Benefits-Program	\$	550,000	\$	524,108.82
763 Affiliate Program Expense	\$	70,000	\$	69,999.96
766-Program Supplies	\$	200,000	\$	200,000.04
767-Postage and Delivery- Program	\$	8,500	\$	8,499.96
770-Part Database/Software	\$	255,000	\$	254,999.64
780-Mileage and Parking-Program	\$	70,000	\$	69,999.96
781-Utilities-Program	\$	75,000	\$	75,000.24
785-Insurance Vehicles-Program	\$	20,000	\$	20,000.04
787-Insurance Worker's Comp-Program	\$	55,000	\$	54,999.96
788-Miscellaneous-Program	\$	1,000	\$	999.96
801 - Consulting Fee-FR	\$	48,000	\$	48,000.00
802-Donor Software and Support	\$	19,500	\$	19,500.00
805-Fundraising Materials/Direct Marketing	\$	75,000	\$	77,001.00
813-Fundraising Salary	\$	157,313	\$	157,313.04
815-Fundraising Benefits	\$	41,000	\$	41,222.04
816-Payroll Tax Fundraising	\$	30,000	\$	30,000.00
900-Buidling Project	\$	600,000	\$	600,000.00
905-Capitalized FF&E	\$	135,000	\$	135,000.00

Notes
Adjust 80 cents
adjust 4 cents
adjust 4 cents
adjust 37 cents
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust 60 cent
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust 4 cents

adjust into 686a, 686 b, and 686c
adjust 36 cents
adjust 76 cents
adjust 4 cents
adjust 4 cents
adjust 24 cents
adjust 4 cents
adjust 24 cents
adjust \$5,891.17
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust 36 cents
adjust 4 cents
adjust 24 cents
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust 4 cents
adjust \$2001
adjust 4 cents
adjust \$222.04

**Family, Inc**  
**Statement of Financial Position**  
As of February 29, 2024

	<u>Total</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
101 Republic Bank General xxxx0518	1,694,454.03
102 Republic Bank Opioid xxxx6280	261,731.02
103 Checking - Truist	7,528.82
104 Checking-Class Act FCU	5,427.86
106.1 Republic Bank Money Market	1,085,440.33
107 Checking- Republic Bank-Restric	31,015.54
109 Republic Bank xxxx9820	113,454.22
111 Fifth Third 2138	14,187.86
113 Fifth Third Securities	97,085.27
115 Republic Bank CD xxxx8605	930,000.00
<b>Total Bank Accounts</b>	<b>4,240,324.95</b>
<b>Accounts Receivable</b>	
120 Grants & Pledges Receivable	438,686.51
1200 Service Fee Receivable	83,289.00
<b>Total Accounts Receivable</b>	<b>521,975.51</b>
<b>Other Current Assets</b>	
134 Prepaid Expenses	213,299.47
135 Prepaid Insurance	61,866.21
<b>Total Other Current Assets</b>	<b>275,165.68</b>
<b>Total Current Assets</b>	<b>5,037,466.14</b>
<b>Fixed Assets</b>	
141 Buildings and Land	3,962,008.52
150 Vehicles	116,948.08
155 Equipment	968,978.28
156 License	99,199.00
158 Website	14,720.00
159 Computer Software	24,536.94
160 Leasehold Improvements	9,276.76
165 Furniture and Fixtures	126,956.42
166 Intellectual Property - Book	54,708.09
174 Accumulated Ammortization	(92,486.02)
175 Accumulated Depreciation	(1,951,699.19)
<b>Total Fixed Assets</b>	<b>3,333,146.88</b>
<b>Other Assets</b>	
177 Construction in Progress	713,190.43
182 Loan to DSH	490,189.55

184 Loan to DSH Home Loan	1,434,313.56
185 Loan to Parkland Scholar House	156,508.00
186 Loan to Riverport	1,436,543.00
186-A FSH DSH 2022 Note	31,755.00
187-A SJSH 2022 Note	69,925.00
190.1 Property Investment - FSH	499,813.00
<b>Total Other Assets</b>	<b>4,832,237.54</b>
<b>TOTAL ASSETS</b>	<b>\$ 13,202,850.56</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
200 Accounts Payable	39,352.78
<b>Total Accounts Payable</b>	<b>39,352.78</b>
<b>Other Current Liabilities</b>	
202 Accrued Interest Payable	3,614.00
219a Employee w/h insurance	3,408.67
219b Employee w/h Short Term Life	542.56
219c Employee w/h voluntary life	735.64
219e Employee Dental WH	185.57
220 Participants Holding	15,821.88
221c Deferred Income-Wine, Women, &	129,997.31
223 Accrued Vacation	57,966.47
<b>Total Other Current Liabilities</b>	<b>212,272.10</b>
<b>Total Current Liabilities</b>	<b>251,624.88</b>
<b>Long-Term Liabilities</b>	
245 N/P DSH-Home Loan	1,288,947.00
245A Accrued Int DSH-HOME loan	32,568.20
246 N/P PSH-Louisville Metro	500,000.00
<b>Total Long-Term Liabilities</b>	<b>1,821,515.20</b>
<b>Total Liabilities</b>	<b>2,073,140.08</b>
<b>Equity</b>	
32000 Unrestricted Net Assets	10,756,694.31
321 Net-Assets-Temp Restricted	734,592.03
Net Revenue	(361,575.86)
<b>Total Equity</b>	<b>11,129,710.48</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 13,202,850.56</b>

Adkins and Lewin "Sonny" Day  
Lexington Scholar House Campus  
Downtown Scholar House Campus  
Stoddard, Johnston Scholar House Campus  
Parkland Scholar House Campus  
Frank and Paula Harshaw  
Riverport Scholar House Campus



Family Scholar House, Inc. does not need to file a December 31, 2021 Form 990 because the fiscal year end of the tax-exempt organization for this period is June 30<sup>th</sup>. Please see the attached confirmations showing that the 7/1/20-6/30/21 and 7/1/21-6/30/22 Form 990 returns have been electronically filed and accepted.

The organization will start to use a 12/31 year end starting with the 2022 filing as requested on the Form 1128 filed with the IRS.

*Changing lives, families and communities through education.*

Central Family Center | Phone: 502.584.3092 | Fax: 502.584.3090 | [www.familycenter.org](http://www.familycenter.org)

8/20/23, 4:56 PM

<https://efile.prosystemfx.com/>

Product: Exempt  
Name: FAMILY SCHOLAR HOUSE, INC.  
EIN: 5124  
Bank Info  
Fiscal Year Begin Date: 7/1/2021  
IRS Message

Category:  
Plan Number  
Fiscal Year End Date: 6/30/2022

IRS Center: Ogden  
ePostmark: 3/22/2023 3:01 PM  
Notification:  
eSigned:

**Return Information**

Date	Return ID	Type of Activity	Submission ID	Refund/(Due)	Updated By	eSign Date
03/20/2023	21X:0175115-0179535.0990.V1	Upload Started			Ganesan, Kamal	
03/20/2023	21X:0175115-0179535.0990.V1	Ready to Release by Customer				
03/22/2023	21X:0175115-0179535.0990.V1	Released for Transmission - Validation In Progress			Stahl, Arleen	
03/22/2023	21X:0175115-0179535.0990.V1	Ready to transmit - Validation Complete				
03/22/2023	21X:0175115-0179535.0990.V1	Transmitted to FD	27100420230810352e05			
03/22/2023	21X:0175115-0179535.0990.V1	Accepted by FD on 3/22/2023				

ID	Status Date	Status	State/Other	State Category	FBAR	FBAR BSA ID
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FAMILY SCHOLAR HOUSE, INC.  
CLIENT COPY  
2022  
YEAR ENDING DECEMBER 31, 2022

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MS. CATHE DYKSTRA  
FAMILY SCHOLAR HOUSE, INC.  
403 REG SMITH CIRCLE  
LOUISVILLE, KY 40208

WE HAVE PREPARED THE FOLLOWING TAX RETURNS PRIMARILY FROM THE INFORMATION YOU FURNISHED. SINCE YOU HAVE THE FINAL RESPONSIBILITY FOR THE TAX RETURNS, YOU SHOULD REVIEW THEM CAREFULLY BEFORE YOU SIGN AND FILE THEM OR AUTHORIZE THEM TO BE ELECTRONICALLY FILED.

2022 FORM 990

PLEASE RETAIN ALL TAX RECORDS, CANCELLED CHECKS AND OTHER DOCUMENTS THAT WERE USED IN THE PREPARATION OF THESE RETURNS, AS THIS INFORMATION MAY BE REQUESTED SHOULD A TAXING AUTHORITY EXAMINE A RETURN.

YOUR COPY HAS EITHER BEEN INCLUDED IN THIS PACKAGE OR SENT TO YOU ELECTRONICALLY. PLEASE RETAIN FOR YOUR FILES.

INSTRUCTIONS FOR FILING THE ABOVE IS INCLUDED FOR EASY REFERENCE.

WE SINCERELY APPRECIATE THE OPPORTUNITY TO SERVE YOU. PLEASE CONTACT US IF YOU HAVE ANY QUESTIONS CONCERNING THE TAX RETURN.

VERY TRULY YOURS,

PHILIP H. CORNBLATT  
PARTNER

**IMPORTANT  
PLEASE RESPOND IMMEDIATELY**

**EFILE SIGNATURE AUTHORIZATION FORM(S)**

**\*\*URGENT – NEW E-FILING RULE WITH MAJOR IMPACT\*\***

DUE TO MORE STRINGENT STATE REQUIREMENTS REGARDING E-FILED RETURNS, WE MUST RECEIVE YOUR E-FILE FORMS WITHIN THE NEXT 5 DAYS OR BY RETURN'S DUE DATE IF EARLIER. IF NOT RECEIVED, YOUR E-FILING MAY BE DELAYED AND A HIGH LIKELIHOOD THAT WE WILL NEED YOU TO RE-SIGN AND DATE ONE OR MORE E-FILE FORMS.

PLEASE REVIEW YOUR TAX RETURN(S) **IMMEDIATELY!** YOUR TAX RETURN(S) CANNOT BE FILED BY US UNTIL WE RECEIVE THE ENCLOSED AUTHORIZATION FORM(S) FROM YOU AUTHORIZING US TO FILE THE ATTACHED FORMS!

**CURRENTLY, THE IRS WILL ACCEPT AN ELECTRONIC SIGNATURE FOR ALL  
FEDERAL E-FILE FORMS.**

**AS THE STATE/LOCAL RULES MAY VARY, MANUAL SIGNATURES ARE  
RECOMMENDED ON SUCH E-FILE AUTHORIZATION FORMS.**

**RETURN THE SIGNED AND DATED AUTHORIZATION FORM(S) VIA:**

- EMAIL: [BALTEFILE@COHNREZNICK.COM](mailto:BALTEFILE@COHNREZNICK.COM)
- FAX: (410) 895-7248
- SECURE UPLOAD VIA SHAREFILE WEB SOLUTION: CLICK [THIS LINK](#) TO ACCESS  
**USE OTHER RETURN OPTIONS IF UNABLE TO ACCESS SHAREFILE LINK**

IF AN ELECTRONIC PAYMENT IS BEING MADE WITH THE RETURN(S), PLEASE NOTIFY YOUR BANKING INSTITUTION OF THE PENDING WITHDRAWAL AND ENSURE THAT YOU HAVE VERIFIED YOUR BANK ACCOUNT NUMBER AND WITHDRAWAL AMOUNTS WITH YOUR ENGAGEMENT TEAM.

WE APPRECIATE YOUR EFFORTS TO RETURN THE COMPLETED ENCLOSED FORM(S) AS SOON AS POSSIBLE.

THANK YOU,

*CohnReznick LLP*

COHNREZNICK LLP

# TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING  
DECEMBER 31, 2022

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**PREPARED FOR:**

MS. CATHE DYKSTRA  
FAMILY SCHOLAR HOUSE, INC.  
403 REG SMITH CIRCLE  
LOUISVILLE, KY 40208

---

**PREPARED BY:**

COHNREZNICK LLP  
500 EAST PRATT STREET, 4TH FLOOR  
BALTIMORE, MD 21202

---

**AMOUNT DUE OR REFUND:**

NOT APPLICABLE

---

**MAKE CHECK PAYABLE TO:**

NOT APPLICABLE

---

**MAIL TAX RETURN AND CHECK (IF APPLICABLE) TO:**

NOT APPLICABLE

---

**RETURN MUST BE MAILED ON OR BEFORE:**

NOT APPLICABLE

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**SPECIAL INSTRUCTIONS:**

THIS RETURN HAS QUALIFIED FOR ELECTRONIC FILING. AFTER YOU HAVE REVIEWED THE RETURN FOR COMPLETENESS AND ACCURACY, PLEASE SIGN, DATE AND RETURN FORM 8879-TE TO OUR OFFICE. WE WILL TRANSMIT THE RETURN ELECTRONICALLY TO THE IRS AND NO FURTHER ACTION IS REQUIRED. RETURN FORM 8879-TE TO US BY NOVEMBER 15, 2023

Form <b>8879-TE</b>	<b>IRS e-file Signature Authorization for a Tax Exempt Entity</b>	OMB No. 1545-0047
For calendar year 2022, or fiscal year beginning <u>JUL 1</u> , 2022, and ending <u>DEC 31</u> , 20 <u>22</u>		2022
Do not send to the IRS. Keep for your records. Go to <a href="http://www.irs.gov/Form8879TE">www.irs.gov/Form8879TE</a> for the latest information.		
Department of the Treasury Internal Revenue Service		
Name of filer <b>FAMILY SCHOLAR HOUSE, INC.</b>		EIN or SSN <b>61-1285124</b>
Name and title of officer or person subject to tax <b>CATHE DYKSTRA PRESIDENT AND CEO</b>		

**Part I Type of Return and Return Information**

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line 1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, or 10a below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b, or 10b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. Do not complete more than one line in Part I.

1a Form 990 check here <input checked="" type="checkbox"/>	b Total revenue, if any (Form 990, Part VIII, column (A), line 12)	1b <u>2,949,523.</u>
2a Form 990-EZ check here	b Total revenue, if any (Form 990-EZ, line 9)	2b
3a Form 1120-POL check here	b Total tax (Form 1120-POL, line 22)	3b
4a Form 990-PF check here	b Tax based on investment income (Form 990-PF, Part V, line 5)	4b
5a Form 8868 check here	b Balance due (Form 8868, line 3c)	5b
6a Form 990-T check here	b Total tax (Form 990-T, Part III, line 4)	6b
7a Form 4720 check here	b Total tax (Form 4720, Part III, line 1)	7b
8a Form 5227 check here	b FMV of assets at end of tax year (Form 5227, Item D)	8b
9a Form 5330 check here	b Tax due (Form 5330, Part II, line 19)	9b
10a Form 8038-CP check here	b Amount of credit payment requested (Form 8038-CP, Part III, line 22)	10b

**Part II Declaration and Signature Authorization of Officer or Person Subject to Tax**

Under penalties of perjury, I declare that ☒ I am an officer of the above entity or I am a person subject to tax with respect to (name of entity) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy of the 2022 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

PIN: check one box only

☒ I authorize **COHNREZNICK LLP**

ERO firm name

to enter my PIN **85124**

Enter five numbers, but do not enter all zeros

as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax

Date

11/14/2023**Part III Certification and Authentication**

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**27100422147**

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2022 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature **COHNREZNICK LLP**

Date

11/13/2023

88BFB4A5FE4D489...

**ERO Must Retain This Form - See Instructions****Do Not Submit This Form to the IRS Unless Requested To Do So**

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

Form **8879-TE** (2022)

Form **8879-TE****IRS e-file Signature Authorization  
for a Tax Exempt Entity**

OMB No. 1545-0047

For calendar year 2022, or fiscal year beginning JUL 1, 2022, and ending DEC 31, 20 22**2022**Department of the Treasury  
Internal Revenue Service**Do not send to the IRS. Keep for your records.****Go to [www.irs.gov/Form8879TE](http://www.irs.gov/Form8879TE) for the latest information.**

Name of filer

**FAMILY SCHOLAR HOUSE, INC.**

EIN or SSN

**61-1285124**

Name and title of officer or person subject to tax

**CATHE DYKSTRA  
PRESIDENT AND CEO****Part I Type of Return and Return Information**

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line 1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, or 10a below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b, or 10b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not complete more than one line in Part I.**

<b>1a</b> Form 990 check here <input checked="" type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990, Part VIII, column (A), line 12) .....	<b>1b</b> <u>2,949,523.</u>
<b>2a</b> Form 990-EZ check here <input type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990-EZ, line 9) .....	<b>2b</b> _____
<b>3a</b> Form 1120-POL check here <input type="checkbox"/>	<b>b</b> Total tax (Form 1120-POL, line 22) .....	<b>3b</b> _____
<b>4a</b> Form 990-PF check here <input type="checkbox"/>	<b>b</b> Tax based on investment income (Form 990-PF, Part V, line 5) .....	<b>4b</b> _____
<b>5a</b> Form 8868 check here <input type="checkbox"/>	<b>b</b> Balance due (Form 8868, line 3c) .....	<b>5b</b> _____
<b>6a</b> Form 990-T check here <input type="checkbox"/>	<b>b</b> Total tax (Form 990-T, Part III, line 4) .....	<b>6b</b> _____
<b>7a</b> Form 4720 check here <input type="checkbox"/>	<b>b</b> Total tax (Form 4720, Part III, line 1) .....	<b>7b</b> _____
<b>8a</b> Form 5227 check here <input type="checkbox"/>	<b>b</b> FMV of assets at end of tax year (Form 5227, Item D) .....	<b>8b</b> _____
<b>9a</b> Form 5330 check here <input type="checkbox"/>	<b>b</b> Tax due (Form 5330, Part II, line 19) .....	<b>9b</b> _____
<b>10a</b> Form 8038-CP check here <input type="checkbox"/>	<b>b</b> Amount of credit payment requested (Form 8038-CP, Part III, line 22) .....	<b>10b</b> _____

**Part II Declaration and Signature Authorization of Officer or Person Subject to Tax**

Under penalties of perjury, I declare that ☒ I am an officer of the above entity or ☐ I am a person subject to tax with respect to (name of entity) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy of the

2022 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

**PIN: check one box only**☒ I authorize **COHNREZNICK LLP**to enter my PIN **85124**

ERO firm name

Enter five numbers, but  
do not enter all zeros

as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax

Date

**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**27100422147**

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2022 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature **COHNREZNICK LLP**Date **11/13/23****ERO Must Retain This Form - See Instructions****Do Not Submit This Form to the IRS Unless Requested To Do So**LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8879-TE** (2022)

Form **8868**

(Rev. January 2024)

Department of the Treasury  
Internal Revenue Service**Application for Extension of Time To File an Exempt Organization  
Return or Excise Taxes Related to Employee Benefit Plans**

OMB No. 1545-0047

**File a separate application for each return.**  
**Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

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

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

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

**Part I — Identification**

<b>Type or Print</b>	Name of exempt organization, employer, or other filer, see instructions.	Taxpayer identification number (TIN)
	<b>FAMILY SCHOLAR HOUSE INC</b>	<b>61-1285124</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>403 REG SMITH CIRCLE</b>	
File by the due date for filing your return. See instructions.	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>LOUISVILLE KY 40208</b>	

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

**01**

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

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

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

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

**Part II — Automatic Extension of Time To File for Exempt Organizations (see instructions)****THE ORGANIZATION**  
**403 REG SMITH CIRCLE**

The books are in the care of **LOUISVILLE** **KY 40208**  
 Telephone No. **502-584-8090** Fax No. ....

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

- 1** I request an automatic 6-month extension of time until **11/15/24**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

☒ calendar year **2023** or☐ tax year beginning ....., and ending .....

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

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

**For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev. 1-2024)

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

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

► **File a separate application for each return.**  
► **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

**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 [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

## Automatic 6-Month Extension of Time. Only submit original (no copies needed).

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

<b>Type or print</b>	Name of exempt organization or other filer, see instructions. <b>FAMILY SCHOLAR HOUSE, INC.</b>	Taxpayer identification number (TIN) <b>61-1285124</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>403 REG SMITH CIRCLE</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>LOUISVILLE, KY 40208</b>	

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

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

### THE ORGANIZATION

- The books are in the care of ► **403 REG SMITH CIRCLE - LOUISVILLE, KY 40208**

Telephone No. ► **502-584-8090**

Fax No. ►

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

- 1 I request an automatic 6-month extension of time until **NOVEMBER 15, 2023**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year or
- ☒ tax year beginning **JUL 1, 2022**, and ending **DEC 31, 2022**.

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

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

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

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

Form **8868** (Rev. 1-2022)

Form **990**Department of the Treasury  
Internal Revenue ServiceCHANGE OF ACCOUNTING PERIOD  
**Return of Organization Exempt From Income Tax**

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

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

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

OMB No. 1545-0047

**2022**Open to Public  
Inspection**A** For the **2022** calendar year, or tax year beginning **JUL 1, 2022** and ending **DEC 31, 2022**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>FAMILY SCHOLAR HOUSE, INC.</b>		<b>D</b> Employer identification number <b>61-1285124</b>
	Doing business as		
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	<b>E</b> Telephone number <b>(502) 584-8090</b>
	<b>403 REG SMITH CIRCLE</b>		
	City or town, state or province, country, and ZIP or foreign postal code <b>LOUISVILLE, KY 40208</b>		<b>G</b> Gross receipts \$ <b>3,064,191.</b>
	<b>F</b> Name and address of principal officer: <b>CATHE DYKSTRA</b> <b>403 REG SMITH CIRCLE, LOUISVILLE, KY 40208</b>		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "No," attach a list. See instructions <b>H(c)</b> Group exemption number
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527			
<b>J</b> Website: <b>WWW.FAMILYSCHOLARHOUSE.ORG</b>			
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other			<b>L</b> Year of formation: <b>1995</b> <b>M</b> State of legal domicile: <b>KY</b>

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>SEE SCHEDULE O</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>30</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>30</b>
	<b>5</b> Total number of individuals employed in calendar year 2022 (Part V, line 2a)	<b>5</b>	<b>56</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>1678</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>7b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>4,241,041.</b>	<b>2,573,927.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>569,119.</b>	<b>278,421.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>61,004.</b>	<b>29,843.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>124,524.</b>	<b>67,332.</b>
	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>4,995,688.</b>	<b>2,949,523.</b>
<b>Expenses</b>	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>147,211.</b>	<b>168,572.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>2,260,814.</b>	<b>1,527,068.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	<b>0.</b>	<b>0.</b>
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>81,098.</b>	
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>2,151,257.</b>	<b>1,177,780.</b>
	<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>4,559,282.</b>	<b>2,873,420.</b>
	<b>20</b> Total assets (Part X, line 16)	<b>436,406.</b>	<b>76,103.</b>
<b>Net Assets or Fund Balances</b>	<b>21</b> Total liabilities (Part X, line 26)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>18,614,591.</b>	<b>18,843,149.</b>
		<b>2,141,457.</b>	<b>2,294,611.</b>
		<b>16,473,134.</b>	<b>16,548,538.</b>

**Part II Signature Block**

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

<b>Sign Here</b>	Signature of officer <b>CATHE DYKSTRA, PRESIDENT AND CEO</b>		Date	
	Type or print name and title			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>PHILIP H. CORNBLATT</b>	Preparer's signature	Date	Check if self-employed <input type="checkbox"/> PTIN <b>P00252478</b>
	Firm's name <b>COHNREZNICK LLP</b>	Firm's EIN <b>22-1478099</b>		
	Firm's address <b>500 EAST PRATT STREET, 4TH FLOOR BALTIMORE, MD 21202</b>	Phone no. <b>410-783-4900</b>		

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No



**Part III** Statement of Program Service Accomplishments

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

☒ X**1** Briefly describe the organization's mission:SEE SCHEDULE O**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?☐ Yes ☒ No

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

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

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

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code: ) (Expenses \$ 2,686,851. including grants of \$ 168,572. ) (Revenue \$ 278,421. )

FSH WORKS TO END THE CYCLE OF POVERTY AND TRANSFORM OUR COMMUNITY BY  
EMPOWERING FAMILIES AND YOUTH TO SUCCEED IN EDUCATION AND ACHIEVE  
LIFE-LONG SELF-SUFFICIENCY. FSH GIVES SINGLE PARENTS AND YOUNG ADULTS  
FORMERLY IN FOSTER CARE THE SUPPORT THEY NEED TO OBTAIN POST-SECONDARY  
EDUCATION THAT LEADS TO A LIVABLE WAGE. FSH BELIEVES THAT EVERYONE  
DESERVES THE OPPORTUNITY TO REALIZE THEIR FULL POTENTIAL AND THAT  
ACCESS TO EDUCATION IS A SIGNIFICANT BARRIER FOR DISADVANTAGED  
FAMILIES. BY PROVIDING ACADEMIC ADVISING, APPRENTICESHIP  
OPPORTUNITIES, HOUSING, CHILDCARE, FAMILY SUPPORT SERVICES, AND  
INTER-GENERATIONAL LEARNING OPPORTUNITIES FOR HEALTH, WELL-BEING AND  
LIFE SKILLS, FSH HELPS TO ADDRESS ALL THE BARRIERS TO SUCCESS IN  
EDUCATION AND LIFE. MANY OF THE PARTICIPANTS COME TO FSH LACKING SOME

**4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4d** Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses 2,686,851.

Form 990 (2022)

**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)? <i>If "Yes," complete Schedule A</i>	<b>1</b> X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	<b>2</b> X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	<b>3</b>	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 "Yes," complete Schedule C, Part II</i>	<b>4</b>	X
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 Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>	<b>5</b>	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? <i>If "Yes," complete Schedule D, Part I</i>	<b>6</b>	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? <i>If "Yes," complete Schedule D, Part II</i>	<b>7</b>	X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	<b>8</b>	X
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? <i>If "Yes," complete Schedule D, Part IV</i>	<b>9</b>	X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>	<b>10</b>	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.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	<b>11a</b> 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? <i>If "Yes," complete Schedule D, Part VII</i>	<b>11b</b>	X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	<b>11c</b> 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? <i>If "Yes," complete Schedule D, Part IX</i>	<b>11d</b>	X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	<b>11e</b>	X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	<b>11f</b> X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	<b>12a</b>	X
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	<b>12b</b> X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	<b>13</b>	X
14a Did the organization maintain an office, employees, or agents outside of the United States?	<b>14a</b>	X
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? <i>If "Yes," complete Schedule F, Parts I and IV</i>	<b>14b</b>	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? <i>If "Yes," complete Schedule F, Parts II and IV</i>	<b>15</b>	X
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? <i>If "Yes," complete Schedule F, Parts III and IV</i>	<b>16</b>	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? <i>If "Yes," complete Schedule G, Part I. See instructions</i>	<b>17</b>	X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	<b>18</b> X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	<b>19</b>	X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	<b>20a</b>	X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<b>20b</b>	
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? <i>If "Yes," complete Schedule I, Parts I and II</i>	<b>21</b>	X

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

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

Note: All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

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

**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	56	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		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 Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	<b>Sponsoring organizations maintaining donor advised funds.</b>		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	<b>Section 501(c)(7) organizations.</b> Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	<b>Section 501(c)(12) organizations.</b> Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
a	Is the organization licensed to issue qualified health plans in more than one state? <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	X
17	<b>Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17	

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

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

☒ **X****Section A. Governing Body and Management**

	1a	1b	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	30			
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		30		
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	X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?			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:				
a 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

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

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

**Section C. Disclosure**

17 List the states with which a copy of this Form 990 is required to be filed KY

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records  
**THE ORGANIZATION - 502-584-8090**  
**403 REG SMITH CIRCLE, LOUISVILLE, KY 40208**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

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

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) CATHE DYKSTRA PRESIDENT & CEO	60.00			X				220,864.	0.	16,639.
(2) KATE L BRACKETT CHIEF OPERATING OFFICER	60.00			X				116,532.	0.	10,767.
(3) CHRISTIAN BOWLES BOARD MEMBER	1.00	X						0.	0.	0.
(4) KYLE BURNS BOARD MEMBER	1.00	X						0.	0.	0.
(5) ELIZABETH CASSADY BOARD MEMBER	1.00	X						0.	0.	0.
(6) BRANDON FORTSON BOARD MEMBER	1.00	X						0.	0.	0.
(7) STEPHANIE FRANCK BOARD MEMBER	1.00	X						0.	0.	0.
(8) JEREMY FRANKFORTH BOARD MEMBER	1.00	X						0.	0.	0.
(9) ADAM HALL CHAIR	5.00	X	X					0.	0.	0.
(10) NATALIE HENDERSON BOARD MEMBER	1.00	X						0.	0.	0.
(11) KATHY HINKEBEIN BOARD MEMBER	1.00	X						0.	0.	0.
(12) JANINE HOGAN BOARD MEMBER	1.00	X						0.	0.	0.
(13) V. FAYE JONES VICE CHAIR	3.00	X	X					0.	0.	0.
(14) MICHELE KOCH BOARD MEMBER	1.00	X						0.	0.	0.
(15) EBONY SPENCER-MULDROW BOARD MEMBER	1.00	X						0.	0.	0.
(16) KIM MORALES BOARD MEMBER	1.00	X						0.	0.	0.
(17) MARY PUTMAN BOARD MEMBER	1.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) TAWANDA LEWIS OWSLEY BOARD MEMBER	1.00	X						0.	0.	0.
(19) GEORGE MCMINN BOARD MEMBER	1.00	X						0.	0.	0.
(20) LAURA PETRY BOARD MEMBER	1.00	X						0.	0.	0.
(21) KRISTIN PICKERELL BOARD MEMBER	1.00	X						0.	0.	0.
(22) TRACY REDMON TREASURER	1.00	X		X				0.	0.	0.
(23) TALLEY RUSSELL BOARD MEMBER	1.00	X						0.	0.	0.
(24) JULIE SAFLEY BOARD MEMBER	1.00	X						0.	0.	0.
(25) BRANDI SANDERS BOARD MEMBER	1.00	X						0.	0.	0.
(26) ERIC SETO BOARD MEMBER	1.00	X						0.	0.	0.
<b>1b Subtotal</b>								337,396.	0.	27,406.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								337,396.	0.	27,406.

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

2

**3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

	Yes	No
<b>3</b>		X
<b>4</b>	X	
<b>5</b>		X

**4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

**5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

**Section B. Independent Contractors**

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

(A) Name and business address	(B) Description of services	(C) Compensation
KERNS SOLUTION CONSULTING, LLC 3103 DANBURY COURT, LOUISVILLE, KY 40242	DATABASE CONSULTING/ADMIN	120,000.
<b>2</b> Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization		1

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2022)





**Part VIII** Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns	<b>1a</b>					
	<b>b</b> Membership dues	<b>1b</b>					
	<b>c</b> Fundraising events	<b>1c</b>	67,715.				
	<b>d</b> Related organizations	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>	1,650,446.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b>	855,766.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$ 18,745.				
	<b>h</b> Total. Add lines 1a-1f		2,573,927.				
	<b>Program Service Revenue</b>	<b>2 a</b> RENTAL INCOME	Business Code	531110	221,236.	221,236.	
<b>b</b> PROJECT SERVICES			900099	36,733.	36,733.		
<b>c</b> INTEREST ON AFF. NOTES			900099	20,498.	20,498.		
<b>d</b> OTHER INCOME			900099	-46.	-46.		
<b>e</b>							
<b>f</b> All other program service revenue							
<b>g</b> Total. Add lines 2a-2f				278,421.			
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts)			29,843.			29,843.
	<b>4</b> Income from investment of tax-exempt bond proceeds						
	<b>5</b> Royalties						
	<b>6 a</b> Gross rents	<b>6a</b>	(i) Real (ii) Personal				
	<b>b</b> Less: rental expenses	<b>6b</b>					
	<b>c</b> Rental income or (loss)	<b>6c</b>					
	<b>d</b> Net rental income or (loss)						
	<b>7 a</b> Gross amount from sales of assets other than inventory	<b>7a</b>	(i) Securities (ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses	<b>7b</b>					
	<b>c</b> Gain or (loss)	<b>7c</b>					
	<b>d</b> Net gain or (loss)						
	<b>8 a</b> Gross income from fundraising events (not including \$ 67,715. of contributions reported on line 1c). See Part IV, line 18	<b>8a</b>		182,000.			
	<b>b</b> Less: direct expenses	<b>8b</b>		114,668.			
	<b>c</b> Net income or (loss) from fundraising events			67,332.			67,332.
	<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	<b>9a</b>					
<b>b</b> Less: direct expenses	<b>9b</b>						
<b>c</b> Net income or (loss) from gaming activities							
<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>10a</b>						
<b>b</b> Less: cost of goods sold	<b>10b</b>						
<b>c</b> Net income or (loss) from sales of inventory							
<b>Miscellaneous Revenue</b>	<b>11 a</b>	Business Code					
	<b>b</b>						
	<b>c</b>						
	<b>d</b> All other revenue						
	<b>e</b> Total. Add lines 11a-11d						
<b>12</b> Total revenue. See instructions			2,949,523.	278,421.	0.	97,175.	

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22	168,572.	168,572.		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	337,397.	310,499.	26,898.	
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	962,907.	919,909.	8,966.	34,032.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	21,583.	20,872.	711.	
<b>9</b> Other employee benefits	100,850.	94,820.	632.	5,398.
<b>10</b> Payroll taxes	104,331.	99,585.	2,023.	2,723.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal				
<b>c</b> Accounting	45,582.	3,360.	42,222.	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees				
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	106,428.	94,428.		12,000.
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses	30,788.	29,147.	1,641.	
<b>14</b> Information technology				
<b>15</b> Royalties				
<b>16</b> Occupancy	13,033.	13,033.		
<b>17</b> Travel	17,695.	17,685.	10.	
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings				
<b>20</b> Interest	13,107.	13,107.		
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	329,198.	321,744.	7,454.	
<b>23</b> Insurance	35,728.	26,728.	9,000.	
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
<b>a</b> <b>CONTRACT SERVICES</b>	232,964.	232,964.		
<b>b</b> <b>PROGRAM PUBLICATIONS</b>	142,747.	142,747.		
<b>c</b> <b>REPAIRS AND MAINTENANCE</b>	69,885.	68,240.	1,645.	
<b>d</b> <b>EMPLOYEE TRAINING</b>	61,921.	61,921.		
<b>e</b> All other expenses	78,704.	47,490.	4,269.	26,945.
<b>25</b> Total functional expenses. Add lines 1 through 24e	2,873,420.	2,686,851.	105,471.	81,098.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

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

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....		<b>1</b>	
	<b>2</b> Savings and temporary cash investments .....	3,473,662.	<b>2</b>	3,698,321.
	<b>3</b> Pledges and grants receivable, net .....	287,497.	<b>3</b>	409,462.
	<b>4</b> Accounts receivable, net .....	29,637.	<b>4</b>	32,669.
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....	1,410,051.	<b>7</b>	1,436,543.
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	309,014.	<b>9</b>	202,022.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 17,628,540.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 7,345,636.		
		10,357,232.	<b>10c</b>	10,282,904.
	<b>11</b> Investments - publicly traded securities .....		<b>11</b>	
	<b>12</b> Investments - other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments - program-related. See Part IV, line 11 .....	2,674,822.	<b>13</b>	2,682,505.
	<b>14</b> Intangible assets .....		<b>14</b>	
<b>15</b> Other assets. See Part IV, line 11 .....	72,676.	<b>15</b>	98,723.	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	18,614,591.	<b>16</b>	18,843,149.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	189,175.	<b>17</b>	195,131.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....	130,767.	<b>19</b>	277,965.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....	1,821,515.	<b>23</b>	1,821,515.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>25</b>	
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	2,141,457.	<b>26</b>	2,294,611.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	15,673,568.	<b>27</b>	15,824,785.
	<b>28</b> Net assets with donor restrictions .....	799,566.	<b>28</b>	723,753.
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> <b>Total net assets or fund balances</b> .....	16,473,134.	<b>32</b>	16,548,538.
<b>33</b> <b>Total liabilities and net assets/fund balances</b> .....	18,614,591.	<b>33</b>	18,843,149.	

Form 990 (2022)

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	2,949,523.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	2,873,420.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	76,103.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	16,473,134.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	-699.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	16,548,538.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☒

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		<input checked="" type="checkbox"/>
<b>b</b> Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<input checked="" type="checkbox"/>	
<b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	<input checked="" type="checkbox"/>	
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	<input checked="" type="checkbox"/>	
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	<input checked="" type="checkbox"/>	

Form 990 (2022)

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open to Public  
Inspection**

Name of the organization

**FAMILY SCHOLAR HOUSE, INC.**

Employer identification number

**61-1285124**

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

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

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
<b>Total</b>						

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

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	1513003.	2086548.	4149310.	4241041.	2506212.	14496114.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 <b>Total.</b> Add lines 1 through 3	1513003.	2086548.	4149310.	4241041.	2506212.	14496114.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						1621081.
6 <b>Public support.</b> Subtract line 5 from line 4.						12875033.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4	1513003.	2086548.	4149310.	4241041.	2506212.	14496114.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	253,300.	46,649.	60,926.	61,004.	29,843.	451,722.
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.)	414,789.	422,583.	118,879.	124,524.	67,332.	1148107.
11 <b>Total support.</b> Add lines 7 through 10						16095943.
12 Gross receipts from related activities, etc. (see instructions)					12	1,940,539.
13 <b>First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b>						<input type="checkbox"/>

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

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))	14	79.99	%
15 Public support percentage from 2021 Schedule A, Part II, line 14	15	75.64	%
16a <b>33 1/3% support test - 2022.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization	<input checked="" type="checkbox"/>		
b <b>33 1/3% support test - 2021.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
17a <b>10% -facts-and-circumstances test - 2022.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
b <b>10% -facts-and-circumstances test - 2021.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	<input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	<input type="checkbox"/>		

Schedule A (Form 990) 2022

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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6</b> Total. Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8</b> Public support. (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
<b>13</b> Total support. (Add lines 9, 10c, 11, and 12.)						

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

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

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

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

<b>17</b> Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f))	<b>17</b>	%
<b>18</b> Investment income percentage from 2021 Schedule A, Part III, line 17	<b>18</b>	%

**19a** 33 1/3% support tests - 2022. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**b** 33 1/3% support tests - 2021. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

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

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

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



**Part IV Supporting Organizations** (continued)

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

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> 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 <b>Part VI</b> 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.		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

**Section C. Type II Supporting Organizations**

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

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

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

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

	Yes	No
<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (see instructions).		
<b>2</b> Activities Test. Answer lines 2a and 2b below.		
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
<b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.		
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in <b>Part VI</b> .		
<b>b</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 <b>Part VI</b> the role played by the organization in this regard.		

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

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

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

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

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990) 2022

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

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i> )	5
6	Other distributions ( <i>describe in Part VI</i> ). See instructions.	6
7	<b>Total annual distributions.</b> Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

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

Schedule A (Form 990) 2022

**Part VI**

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

Supplemental information area with horizontal lines for text entry.

## 2022

\*\*\* Not Open to Public Inspection \*\*\*

223171 04-01-22

**Schedule B**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990 or Form 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2022**

Name of the organization

Employer identification number

**FAMILY SCHOLAR HOUSE, INC.**

**61-1285124**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

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

☐ 501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

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

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

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

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

Name of organization	Employer identification number
<b>FAMILY SCHOLAR HOUSE, INC.</b>	<b>61-1285124</b>

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	TOYOTA 1001 CHERRY BLOSSOM WAY GEORGETOWN, KY 40324	\$ 69,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	FOUREVERGREEN FOUNDATION 10069 SE SANDPIPE LN HOBE SOUND, FL 33455	\$ 109,691.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	SCHNEIDER, ELLEN 1845 TAMARACK CT.N COLUMBUS, OH 43229	\$ 68,700.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	SAM SWOPE FAMILY FOUNDATION INC 225 NELSON MILLER PKWY, STE 102 LOUISVILLE, KY 40223	\$ 65,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	MICHELIN 1 PARKWAY SOUTH GREENVILLE, SC 29615	\$ 67,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

61-1285124

## Part II

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



Employer identification number

61-1285124

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) \$ \_\_\_\_\_

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

**SCHEDULE D**  
(Form 990)Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
Attach to Form 990.Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**Open to Public  
Inspection

Name of the organization

FAMILY SCHOLAR HOUSE, INC.

Employer identification number

61-1285124

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the  
organization answered "Yes" on Form 990, Part IV, line 6.

	(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? <input type="checkbox"/> Yes <input type="checkbox"/> No		
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? <input type="checkbox"/> Yes <input type="checkbox"/> No		

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after July 25, 2006, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year .....

4 Number of states where property subject to conservation easement is located .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

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

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

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

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

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 .....	\$ .....
(ii) Assets included in Form 990, Part X .....	\$ .....

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

a Revenue included on Form 990, Part VIII, line 1 .....	\$ .....
b Assets included in Form 990, Part X .....	\$ .....

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

Schedule D (Form 990) 2022

232051 09-01-22

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

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

a ☐ Public exhibitiond ☐ Loan or exchange programb ☐ Scholarly researche ☐ Other \_\_\_\_\_c ☐ Preservation for future generations

- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

- b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c	
1d	
1e	
1f	

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

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

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

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

a Board designated or quasi-endowment \_\_\_\_\_ %

b Permanent endowment \_\_\_\_\_ %

c Term endowment \_\_\_\_\_ %

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

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

(i) Unrelated organizations

(ii) Related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

- b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

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

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

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		821,309.		821,309.
b Buildings		14,957,513.	6,504,315.	8,453,198.
c Leasehold improvements		408,181.		408,181.
d Equipment		1,223,139.	748,882.	474,257.
e Other		218,398.	92,439.	125,959.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				10,282,904.

Schedule D (Form 990) 2022

**Part VII Investments - Other Securities.**

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

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)		

**Part VIII Investments - Program Related.**

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) INVESTMENTS IN SJSH	-1.	COST
(2) INVESTMENT IN PARKLAND SH	97.	COST
(3) INVESTMENT IN DSH	499,705.	COST
(4) INVESTMENT IN PIKEVILLE		
(5) SH	12.	COST
(6) NOTES RECEIVABLE TO DSH	1,956,259.	COST
(7) NOTES RECEIVABLE TO		
(8) PARKLAND SCHOLAR HOUSE	156,508.	COST
(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	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

**Part X Other Liabilities.**

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

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

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 ☒

Schedule D (Form 990) 2022

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

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

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

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

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

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

**Part XIII Supplemental Information.**

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

**PART X, LINE 2:**

FAMILY SCHOLAR HOUSE, INC. ("FSH") AND ITS CONSOLIDATED NONPROFIT CORPORATIONS ARE EXEMPT FROM FEDERAL AND STATE INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND COMPARABLE STATE STATUTES. FSH DID NOT HAVE ANY UNRELATED BUSINESS INCOME FOR THE PERIOD FROM JULY 1, 2022 THROUGH DECEMBER 31, 2022 AND THE YEAR ENDED JUNE 30, 2022. ALL NONPROFIT CORPORATIONS ARE REQUIRED TO FILE TAX RETURNS WITH THE IRS AND OTHER TAXING AUTHORITIES. MANAGEMENT HAS ANALYZED THE TAX POSITIONS TAKEN BY THE ORGANIZATION AND HAS CONCLUDED THAT, AS OF DECEMBER 31, 2022, THERE ARE NO UNCERTAIN TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN THAT WOULD REQUIRE RECOGNITION OF A LIABILITY (OR ASSET) OR DISCLOSURE IN THE CONSOLIDATED FINANCIAL STATEMENTS. INCOME TAX RETURNS FILED BY THE

**Part XIII** Supplemental Information *(continued)*

ORGANIZATION AND ITS CONSOLIDATED ENTITIES ARE SUBJECT TO EXAMINATION BY THE INTERNAL REVENUE SERVICE FOR A PERIOD OF THREE YEARS. WHILE NO INCOME TAX RETURNS ARE CURRENTLY BEING EXAMINED BY THE INTERNAL REVENUE SERVICE, TAX YEARS SINCE 2019 REMAIN OPEN.



Department of the Treasury  
Internal Revenue Service

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

OMB No. 1545-0047

2022

**Open to Public Inspection**

Name of the organization

FAMILY SCHOLAR HOUSE, INC.

Employer identification number

61-1285124

**Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- a ☐ Mail solicitations
- b ☐ Internet and email solicitations
- c ☐ Phone solicitations
- d ☐ In-person solicitations
- e ☐ Solicitation of non-government grants
- f ☐ Solicitation of government grants
- g ☐ Special fundraising events

☐ Yes☐ No

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

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

Schedule G (Form 990) 2022



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

	(a) Event #1 GALA EVENT (event type)	(b) Event #2 (event type)	(c) Other events NONE (total number)	(d) Total events (add col. (a) through col. (c))
<b>Revenue</b>				
1 Gross receipts	249,715.			249,715.
2 Less: Contributions	67,715.			67,715.
3 Gross income (line 1 minus line 2)	182,000.			182,000.
<b>Direct Expenses</b>				
4 Cash prizes				
5 Noncash prizes				
6 Rent/facility costs	82,573.			82,573.
7 Food and beverages				
8 Entertainment	4,575.			4,575.
9 Other direct expenses	27,520.			27,520.
10 Direct expense summary. Add lines 4 through 9 in column (d)				114,668.
11 Net income summary. Subtract line 10 from line 3, column (d)				67,332.

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

	(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
<b>Revenue</b>				
1 Gross revenue				
<b>Direct Expenses</b>				
2 Cash prizes				
3 Noncash prizes				
4 Rent/facility costs				
5 Other direct expenses				
6 Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7 Direct expense summary. Add lines 2 through 5 in column (d)				
8 Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

- 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 formed to administer charitable gaming? ☐ Yes ☐ No
- 13** Indicate the percentage of gaming activity conducted in:
- |                                      |            |   |
|--------------------------------------|------------|---|
| <b>a</b> The organization's facility | <b>13a</b> | % |
| <b>b</b> An outside facility         | <b>13b</b> | % |
- 14** Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name \_\_\_\_\_

Address \_\_\_\_\_

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

- 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** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

<b>Part IV</b>	<b>Supplemental Information</b> (continued)
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[illegible]

## 83

Part III

Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
BASIC NEEDS	1322	4,891.	56,322. COST		CHILDCARE/HOUSING
EDUCATION	784	5,846.	34,977. COST		EDUCATIONAL ASSISTANCE/MATERIALS
FOOD	2793	4,133.	53,461. COST		EMERGENCY FOOD
TRANSPORTATION	391	0.	8,942. COST		BUS PASSES/VAN FUEL

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:

ALL GRANT FUNDS RECEIVED BY FAMILY SCHOLAR HOUSE, INC. ARE MANAGED

ACCORDING TO THE TERMS AND RESTRICTIONS OUTLINED BY THE GRANTORS, INCLUDING

PROGRAM COMPLIANCE AND OUTCOMES, SPENDING, AND REPORTING. THE VICE

PRESIDENT OF PROGRAMS AND SERVICES IS RESPONSIBLE FOR MONITORING AND

IMPLEMENTING ALL PROGRAM COMPLIANCE AND OUTCOMES MEASUREMENT TO ENSURE THEY

MEET THE RESTRICTIONS AND TERMS OF THE GRANT AWARD. THE DONOR RELATIONS

SPECIALIST IS RESPONSIBLE FOR ALLOCATING LINE-ITEM EXPENSES TO ALL

RESTRICTED GRANTS AND MAINTAINING ALL RESTRICTED GRANT FILES INCLUDING

**Part IV** Supplemental Information

AGREEMENTS, REPORTS, INVOICES, AND SPENDING DOCUMENTATION. THE EXTERNAL BOOKKEEPING SERVICE POSTS ALL RESTRICTED GRANT SPENDING INTO THE ACCOUNTING SYSTEM, MAINTAINING REMAINING BALANCES FOR ALL OPEN RESTRICTED GRANTS RECEIVED. THE DIRECTOR OF MISSION ADVANCEMENT IS RESPONSIBLE FOR ALL REQUIRED GRANT REPORTING, SPENDING OVERSIGHT, SUPERVISION OF THE ACTIVITIES OF THE DONOR RELATIONS SPECIALIST, AND LIAISING WITH THE EXTERNAL BOOKKEEPING SERVICE.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

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

OMB No. 1545-0047

**2022**

Open to Public  
Inspection

Name of the organization

**FAMILY SCHOLAR HOUSE, INC.**

Employer identification number

**61-1285124**

**Part I Questions Regarding Compensation**

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

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

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

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

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

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

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

- a** Receive a severance payment or change-of-control payment?
- b** Participate in or receive payment from a supplemental nonqualified retirement plan?
- c** Participate in or receive payment from an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

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

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

- a** The organization?
- b** Any related organization?

If "Yes" on line 5a or 5b, describe in Part III.

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

- a** The organization?
- b** Any related organization?

If "Yes" on line 6a or 6b, describe in Part III.

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

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

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

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

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

Schedule J (Form 990) 2022





<b>Part III</b>	<b>Supplemental Information</b>
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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.

[illegible]

**SCHEDULE O**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

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

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

OMB No. 1545-0047

**2022**

Open to Public  
Inspection

Name of the organization

FAMILY SCHOLAR HOUSE, INC.

Employer identification number  
61-1285124

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

TO END THE CYCLE OF POVERTY AND TRANSFORM OUR COMMUNITY BY EMPOWERING  
FAMILIES AND YOUTH TO SUCCEED IN EDUCATION AND ACHIEVE LIFE-LONG SELF  
SUFFICIENCY.

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

THE MISSION OF FAMILY SCHOLAR HOUSE ("FSH") IS TO END THE CYCLE OF  
POVERTY BY GIVING SINGLE-PARENTS AND YOUNG ADULTS FORMERLY IN FOSTER  
CARE THE SUPPORT THEY NEED TO OBTAIN POST-SECONDARY EDUCATION THAT  
LEADS TO A LIVABLE WAGE. FSH WORKS TO END THE CYCLE OF POVERTY AND  
TRANSFORM OUR COMMUNITY BY EMPOWERING FAMILIES AND YOUTH TO SUCCEED IN  
EDUCATION AND ACHIEVE LIFE-LONG SELF-SUFFICIENCY. FSH BELIEVES THAT  
EVERYONE DESERVES THE OPPORTUNITY TO REALIZE THEIR FULL POTENTIAL AND  
THAT ACCESS TO EDUCATION IS A SIGNIFICANT BARRIER FOR DISADVANTAGED  
FAMILIES. BY PROVIDING ACADEMIC ADVISING, APPRENTICESHIP OPPORTUNITIES,  
HOUSING, CHILDCARE, FAMILY SUPPORT SERVICES, AND INTER-GENERATIONAL  
LEARNING OPPORTUNITIES FOR HEALTH, WELL BEING AND LIFE-SKILLS, WE HELP  
TO ADDRESS ALL THE BARRIERS TO SUCCESS IN EDUCATION AND LIFE.

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

OF THE BASIC LIFE SKILLS NECESSARY FOR THEM TO BE SELF-SUFFICIENT,  
INCLUDING FINANCIAL LITERACY, HEALTHY LIFESTYLES, STRESS MANAGEMENT,  
AND PHYSICAL FITNESS. WHILE THE PARENT-SCHOLAR IS AT THE CENTER OF  
MANY PROGRAMS, FSH ALSO SUPPORTS THE CHILDREN IN OUR PROGRAM, WHO  
RECEIVE THE SUPPORT AND RESOURCES THEY NEED TO BECOME SUCCESSFUL  
STUDENTS AND ASPIRE TO PROCEED TO HIGHER EDUCATION IN THEIR ADULT LIFE.

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

Schedule O (Form 990) 2022

232211 10-28-22

Name of the organization

FAMILY SCHOLAR HOUSE, INC.

Employer identification number

61-1285124

THIS INCLUDES PROGRAMS LIKE TODDLER BOOK CLUB, CHILDREN FOR CHANGE, AND CAREER ACADEMY. FSH CREATES A COLLEGE-GOING CULTURE FOR EVERY PARTICIPANT IN THE PROGRAM. FSH CAMPUSES BECOME COMMUNITIES OF PEER SUPPORT, PROVIDING A NETWORK OF PEOPLE WITH SIMILAR BACKGROUNDS AND EXPERIENCES WHO STRENGTHEN AND ENCOURAGE ONE ANOTHER THROUGH THE CHALLENGES OF HIGHER EDUCATION AND PARENTING. THUS FAMILY SCHOLAR HOUSE, INC. IS AN EDUCATIONAL PROGRAM WITH A HOUSING COMPONENT THAT UTILIZES INTERNAL RESOURCES AND COMMUNITY COLLABORATIONS TO MEET THE NEEDS OF THE FAMILIES SERVED.

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

THE 990 IS REVIEWED BY THE FINANCE COMMITTEE, INCLUDING THE BOARD TREASURER. RECOMMENDATIONS ARE THEN MADE TO THE EXECUTIVE COMMITTEE FOR ACTION. THE 990 IS THEN SIGNED BY THE PRESIDENT AND CEO.

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

EVERY BOARD MEMBER COMPLETES A CONFLICT OF INTEREST FORM ANNUALLY. THE FORMS ARE THEN REVIEWED BY THE BOARD GOVERNANCE COMMITTEE AND ANY CHANGES THAT ARE RECOMMENDED ARE REFERRED TO THE EXECUTIVE COMMITTEE AND/OR FULL BOARD FOR ACTION.

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

THE PROCESS FOR DETERMINING COMPENSATION FOR THE CEO INCLUDES REVIEW AND APPROVAL BY THE BOARD OF DIRECTORS, USE OF DATA AS TO COMPARABLE COMPENSATION, AND CONTEMPORANEOUS DOCUMENTATION AND RECORDKEEPING. THERE ARE NO OTHER OFFICERS OR KEY EMPLOYEES THAT RECEIVE COMPENSATION FROM THE ORGANIZATION.

Name of the organization

FAMILY SCHOLAR HOUSE, INC.

Employer identification number

61-1285124

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

THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND  
FINANCIAL STATEMENTS ARE MADE AVAILABLE TO THE PUBLIC BY REQUEST.

FORM 990, PART XII, LINE 2C:

THE PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR. THE FINANCE COMMITTEE  
ASSUMES RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT, REVIEW, OR  
COMPILATION OF ITS FINANCIAL STATEMENTS AND SELECTION OF AN INDEPENDENT  
ACCOUNTANT BY EVALUATING THE INDEPENDENT AUDITORS QUALIFICATIONS,  
INDEPENDENCE, AND PERFORMANCE BASED ON THE MEMBERS EXPERIENCE IN  
BUDGETING AND FINANCIAL MANAGEMENT, INTEREST IN THE MISSION OF FAMILY  
SCHOLAR HOUSE, AND THEIR DESIRE TO USE FINANCIAL SKILLS TO ASSIST IN  
THE WORK OF FAMILY SCHOLAR HOUSE.



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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?	(k) Percentage ownership
							Yes	No			
DOWNTOWN SCHOLAR HOUSE, LLLP - 27-0661625, 403 REG SMITH CIRCLE, LOUISVILLE, KY 40208	CONSTRUCTION	KY	N/A	N/A							
STODDARD JOHNSTON SCHOLAR HOUSE, LLLP - 27-3079175, 403 REG SMITH CIRCLE, LOUISVILLE, KY 40208	CONSTRUCTION	KY	SJSP GP LLC	RELATED	0.	-157.			N/A	X	.01%
PARKLAND SCHOLAR HOUSE, LLLP - 37-1696499, 403 REG SMITH CIRCLE, LOUISVILLE, KY 40208	CONSTRUCTION	KY	N/A	N/A					N/A	X	.01%

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	Section 512(b)(13) controlled entity?	
								Yes	No
DSH GP INC - 27-2147115 403 REG SMITH CIRCLE LOUISVILLE, KY 40208	LIHTC	KY	FSH INC.	C CORP	-381.	503,356.	100%		X
PARKLAND GP, LLC - 45-5565154 403 REG SMITH CIRCLE LOUISVILLE, KY 40208	LIHTC	KY	FSH INC.	C CORP	-49.	193,416.	100%		X
PARKLAND SCHOLAR HOUSE, LLLP - 37-1696499 403 REG SMITH CIRCLE LOUISVILLE, KY 40208	CONSTRUCTION	KY	FSH INC.	C CORP	-49.	193,414.	.01%		X

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

(a) Name of related organization		(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) DOWNTOWN SCHOLAR HOUSE LLC		D	1,956,259. COST	
(2) PARKLAND SCHOLAR HOUSE		D	156,508. COST	
(3) STODDARD JOHNSTON SCHOLAR HOUSE		D	69,925. COST	
(4)				
(5)				
(6)				





## Part VII Supplemental Information

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

0409134.09 <sup>darmstrong</sup>  
NAOA

Trey Grayson  
Secretary of State  
Received and Filed  
07/25/2008 12:48:41 PM  
Fee Receipt: \$8.00

**ARTICLES OF AMENDMENT TO THE**  
**ARTICLES OF INCORPORATION OF PROJECT WOMEN, INC.**

Pursuant to KRS § 273.267, the undersigned corporation executes these Articles of Amendment to its Articles of Incorporation:

- (A) The name of the corporation is Project Women, Inc.
- (B) The following amendments to the Articles of Incorporation were adopted by the Board of Directors of the corporation on the 17th day of July, 2008, in the manner prescribed by the Kentucky Non-Profit Corporation Acts:

Article I is deleted in its entirety and substituting in lieu thereof the following:

**ARTICLE I**

The name of the Corporation shall be: FAMILY SCHOLAR HOUSE, INC.

IN WITNESS WHEREOF, the undersigned duly authorized officer has executed these Articles of Amendment as of this 17th day of July, 2008.

FAMILY SCHOLAR HOUSE, INC.

By:   
Jennifer Leibson, Chair of the Board

0000683P00492

0409134.09

AMcRay  
NAOA

Trey Grayson  
Secretary of State  
Received and Filed  
02/29/2008 11:03:31 AM  
Fee Receipt: \$8.00

**ARTICLES OF AMENDMENT TO THE  
ARTICLES OF INCORPORATION OF  
PROJECT WOMEN, INC.**

Pursuant to KRS 273.267, the undersigned corporation executes these Articles of Amendment to Articles of Incorporation:

1. The name of the corporation is Project Women, Inc.
2. The following amendments to the Articles of Incorporation were adopted by the Board of Directors of the corporation on the 20 day of February, 2008, by a consent in writing signed by all members entitled to vote with respect thereto.

Article IV is deleted in its entirety and substituting in lieu thereof the following:

**ARTICLE IV**

The Corporation is organized and shall be operated exclusively for charitable and educational purposes as described within Section 501(c)(3) of the Internal Revenue Code (or corresponding provisions of any later Federal tax laws), including for such purposes the making of distributions to organizations and individuals for the purpose of engaging in any activity falling within the purposes of the corporation and permitted for an organization exempt under said Section 501(c)(3).

The purposes of the Corporation shall be more specifically stated as follows:

The organization shall assist households in crisis and their children through support programs, including education, counseling, and affordable housing, and do any and all further acts consistent with the purposes herein as set forth, as now or hereafter authorized by law for a corporation, it being the intention that the enumeration of specific powers shall not operate to limit in any manner the general powers conferred upon corporations by the laws of the Commonwealth of Kentucky.

IN WITNESS WHEREOF, the undersigned duly authorized officer has executed these Articles of Amendment as of this 20 day of February, 2008.

Project Women, Inc.  
A Kentucky nonprofit corporation

By: Jennifer Leibson  
Jennifer Leibson, Chair of the Board

Document No.: DH2008030381  
Lodged By: STEVENSON  
Recorded On: 03/03/2008 08:00:35  
Total Fees: 11.00  
Transfer Tax: .00  
County Clerk: BOBBIE HOLSCLOUGH-JEFF CO KY  
Deputy Clerk: GIESCH

0409134.09

PBlavins  
NAOA

Trey Grayson  
Secretary of State  
Received and Filed  
02/28/2005 9:58:15 AM  
Fee Receipt: \$8.00

**ARTICLES OF AMENDMENT TO THE  
ARTICLES OF INCORPORATION OF PROJECT WOMEN, INC.**

Pursuant to KRS 273.267, the undersigned corporation executes these Articles of Amendment to its Articles of Incorporation:

(A) The name of the corporation is Project Women, Inc.

(B) The following amendments to the Articles of Incorporation were adopted by the Board of Directors of the corporation on the 21st day of February, 2005, in the manner prescribed by the Kentucky Non-Profit Corporation Acts:

Article IV is deleted in its entirety and substituting in lieu thereof the following:

**ARTICLE IV**

The Corporation is organized and shall be operated exclusively for charitable and educational purposes as described within Section 501(c)(3) of the Internal Revenue Code (or corresponding provisions of any later Federal tax laws), including for such purposes the making of distributions to organizations and individuals for the purpose of engaging in any activity falling within the purposes of the corporation and permitted for an organization exempt under said Section 501(c)(3).

The purposes of the Corporation shall be more specifically stated as follows:

The organization shall assist women in crises and their children through support programs, including education, counseling, and affordable housing, and do any and all further acts consistent with the purposes herein set forth, as now or hereafter authorized by law for a corporation, it being the intention that the enumeration of specific powers shall not operate to limit in any manner the general powers conferred upon corporations by the laws of the Commonwealth of Kentucky.

IN WITNESS WHEREOF, the undersigned duly authorized officer has executed these Articles of Amendment as of this 24th day of February, 2005.

Project Women, Inc.

FILED IN OFFICE

MAR 04 2005

By:

Lisa H. Thomas

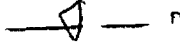
Lisa H. Thomas, Chair of the Board

Bobbie Holsclaw, Clerk

By \_\_\_\_\_ D.C.

FILED  
JEFF. CO., KY

DEC 22 1995

Rebecca Jackson, Clerk  


ARTICLES OF INCORPORATION

OF

PROJECT WOMEN, INC.

RECEIVED & FILED  
DEC 15 8 00  
11 01 AM '95  
BOA BOARD  
SECRETARY  
CLERK OF STATE  
KENTUCKY

WE, THE UNDERSIGNED, having associated for the purposes of forming a non-profit, non-stock corporation, under and pursuant to the laws of the Commonwealth of Kentucky, and more particularly Chapter 273, Kentucky Revised Statutes (KRS), hereby certify as follows:

ARTICLE I

The name of the Corporation shall be:

PROJECT WOMEN, INC.

ARTICLE II

The duration of the Corporation shall be perpetual.

ARTICLE III

The address of the registered office of the corporation is:

3105 Lexington Road, Louisville, Kentucky, 40206

The name of the initial registered agent for service of process, located at such address is:

ANNE MARY LOCHNER

The principal office of the Corporation is located at:

3105 Lexington Road, Louisville, Kentucky, 40206

Other places of business in said city or elsewhere may be designated by resolution of the Board of Directors.

ARTICLE IV

The Corporation is organized and shall be operated exclusively for charitable and educational purposes as described within Section 501(c)(3) of the Internal Revenue Code (or corresponding provisions of any later Federal tax laws), including for such purposes the making of distributions to organizations and individuals for the

purpose of engaging in activity falling within the purposes of the Corporation and permitted for an organization exempt under said Section 501(c)(3).

The purposes of the Corporation shall be more specifically stated as follows:

The organization shall assist women in crises and their children through support programs, including education, counseling, and housing, and do any and all further acts consistent with the purposes herein set forth, as now or hereafter authorized by law for a corporation, it being the intention that the enumeration of specific powers shall not operate to limit in any manner the general powers conferred upon corporations by the laws of the Commonwealth of Kentucky.

#### ARTICLE V

The Corporation shall be irrevocably dedicated to and operated exclusively for, non-profit purposes. No part of the net earnings of the Corporation shall inure to the benefit of or be distributable to its members, directors, officers, or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article IV hereof.

#### ARTICLE VI

In carrying out the corporate purposes described in Article IV, the Corporation shall have all the powers granted by the laws of the State of Kentucky, including in particular those listed in KRS 273.171 (or corresponding provision of any later State statute), except as follows and as otherwise stated in these Articles:

a) No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements), any political campaign on behalf of any candidate for public office.

b) Notwithstanding any other provision of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on:

- 1) by a corporation exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code, or the corresponding provisions of any subsequent Federal tax laws.
- 2) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws.
- c) If and so long as the Corporation is a private foundation as defined in Section 509(a) of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws:
  - 1) The Corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws.
  - 2) The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws.
  - 3) The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws.
  - 4) The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code, or corresponding provisions of any later tax laws.
  - 5) The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Internal Revenue Code, or corresponding provisions of any later Federal tax laws.

#### ARTICLE VII

The names and addresses of the incorporator is:

##### INCORPORATOR

##### ADDRESS

Anne Mary Lochner

3105 Lexington Road  
Louisville, Kentucky, 40206

#### ARTICLE VIII

The names and addresses of the members of the initial Board of Directors are:

DIRECTOR

ADDRESS

Sharen Baldy, SCN

1332 Winter Avenue  
Louisville, KY 40204

Dolores Delahanty

1501 Iroquois Parkway  
Louisville, KY 40214

Bernadette Faulhaber, RSG

1015 Dorsey Lane  
Louisville, KY 40223

Lucy Freibert, SCN

1507 Hepburn, #2  
Louisville, KY 40204

Mary Jo Gramig, OSU

3115 Lexington Road  
Louisville, KY 40206

ARTICLE IX

The initial By-Laws shall be adopted by the initial Board of Directors. Thereafter, the Corporation shall be governed by the By-Laws.

Any director may be removed for cause pursuant to By-Laws provisions regarding grounds and procedures for such removal.

ARTICLE X

a) The directors, officers, employees and members of this Corporation shall not be held personally liable for any debt or obligation of the Corporation solely because of their position in the Corporation.

b) Any person serving on the Board of Directors of this Corporation shall not be held personally liable for monetary damages resulting from the breach of his/her duties as a director unless such act, omission or breach:

- 1) concerned or concerns a transaction in which the director's personal financial interest was or is in conflict with the financial interests of the Corporation;
- 2) was not in good faith or involved or involves intentional misconduct on the part of the director;
- 3) was known by the director to be a violation of law;  
or
- 4) resulted in an improper personal benefit to the director.



This paragraph b) applies only to acts or omissions or breaches of duty occurring after July 15, 1988.

#### ARTICLE XI

Any director or officer or former director or officer of the Corporation, may be indemnified by the Corporation against any expenses actually and reasonably incurred by him/her in connection with the defense of any action, suit or proceeding, civil or criminal, in which s/he is made a party by reason of being or having been such director or officer, except in relation to matters as to which s/he shall be adjudged in such action, suit or proceeding to be liable for negligence or misconduct in the performance of duty to the Corporation. The Corporation may make any other indemnification permitted by law and authorized by its Articles of Incorporation, or its By-laws or a resolution adopted after notice to members entitled to vote.

#### ARTICLE XII

In the event of dissolution of the Corporation, the Board of Directors shall, after paying or making provision for the payment of all liabilities of the Corporation, dispose of all assets of the Corporation exclusively for the purposes of the Corporation, in such manner, or to such organizations organized and operated exclusively for charitable or educational purposes as shall at the time qualify as an exempt organization under Section 501(c)(3) of the Internal Revenue Code (or corresponding provisions of any later Federal tax laws), as the Board of Directors shall determine.

The remaining assets, if any, shall be disposed of by the Circuit Court of the county in which the principal office for the Corporation is then located, exclusively for such purposes or to such organizations as said Court shall determine are organized and operated exclusively for such purposes.

#### ARTICLE XIII

Amendments to these Articles shall be made pursuant to the provisions of KRS 273.263 (or corresponding provision of any later State statute).

IN TESTIMONY WHEREOF, witness the signature of the Incorporator of this Corporation, this 13 day of December, 1995.

Anne Mary Lochner, D.S.V.  
ANNE MARY LOCHNER, INCORPORATOR

STATE OF KENTUCKY )  
COUNTY OF JEFFERSON )

The foregoing Articles of Incorporation were acknowledged  
before me this 13 day of DECEMBER, 1995, by MAEY LACHNER  
of office. Witness my signature and seal

My Commission Expires: September 26, 1999

Alan B. Norris  
NOTARY PUBLIC  
STATE AT LARGE, KENTUCKY

This Document Prepared By:

Carol Markovitz Raskin  
CAROL MARKOVITZ RASKIN  
Attorney at Law  
LEGAL AID SOCIETY, INC.  
425 West Muhammad Ali Blvd.  
Louisville, Kentucky 40202  
(502) 584-1254

**Request for Taxpayer  
Identification Number and Certification**

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

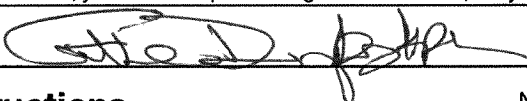
Give form to the  
requester. Do not  
send to the IRS.

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <b>Family Scholar House, Inc.</b>	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input checked="" type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . . <b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) <u>1</u> Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) <u>A</u>  (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. <b>403 Reg Smith Circle</b>	Requester's name and address (optional)
	6 City, state, and ZIP code <b>Louisville, KY 40208</b>	
	7 List account number(s) here (optional)	

<b>Part I Taxpayer Identification Number (TIN)</b>																																															
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.																																															
<b>Note:</b> If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																																															
<table border="1"><tr><td colspan="9">Social security number</td></tr><tr><td></td><td></td><td></td><td></td><td>-</td><td></td><td></td><td></td><td></td></tr><tr><td colspan="9">or</td></tr><tr><td colspan="9">Employer identification number</td></tr><tr><td>6</td><td>1</td><td>-</td><td>1</td><td>2</td><td>8</td><td>5</td><td>1</td><td>2</td><td>4</td></tr></table>		Social security number													-					or									Employer identification number									6	1	-	1	2	8	5	1	2	4
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Employer identification number																																															
6	1	-	1	2	8	5	1	2	4																																						

<b>Part II Certification</b>	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and	
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and	
3. I am a U.S. citizen or other U.S. person (defined below); and	
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.	
<b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.	

Sign Here	Signature of U.S. person 	Date <u>July 2, 2024</u>
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**What's New**

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Financial Statements  
(With Supplementary Information)  
and Independent Auditor's Report**

**June 30, 2022 and 2021**

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**CohnReznick**  
ADVISORY • ASSURANCE • TAX



# Family Scholar House, Inc. and Subsidiaries

## Index

	<u>Page</u>
Independent Auditor's Report	2
Consolidated Financial Statements	
Consolidated Statements of Financial Position	5
Consolidated Statements of Activities	7
Consolidated Statements of Changes in Net Assets	8
Consolidated Statements of Functional Expenses	9
Consolidated Statements of Cash Flows	11
Notes to Consolidated Financial Statements	12
Supplementary Information	
Consolidating Information	29

## Independent Auditor's Report

To the Board of Directors  
Family Scholar House, Inc. and Subsidiaries

### *Opinion*

We have audited the accompanying consolidated financial statements of Family Scholar House, Inc. and Subsidiaries, which comprise the consolidated statements of financial position as of June 30, 2022 and 2021, and the related consolidated statements of activities, consolidated statements of changes in net assets, consolidated statements of functional expenses, and consolidated statements of cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of Family Scholar House, Inc. and Subsidiaries as of June 30, 2022 and 2021, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### *Basis for Opinion*

We conducted our audits in accordance with auditing standards generally accepted in the United States of America ("GAAS"). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Consolidated Financial Statements section of our report. We are required to be independent of Family Scholar House, Inc. and Subsidiaries and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### *Responsibilities of Management for the Consolidated Financial Statements*

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Family Scholar House, Inc. and Subsidiaries' ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

*Auditor's Responsibilities for the Audit of the Consolidated Financial Statements*

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements, including omissions, are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Family Scholar House, Inc. and Subsidiaries' internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Family Scholar House, Inc. and Subsidiaries' ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audits.

## Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the consolidated financial statements taken as a whole. The consolidating statement of financial position and consolidating statement of activities and changes in net assets are not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audits of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.



Charlotte, North Carolina  
October 6, 2022



**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Statements of Financial Position  
June 30, 2022 and 2021**

	<u>2022</u>	<u>2021</u>
<b>Assets</b>		
Current assets		
Cash and cash equivalents - corporate operations	\$ 2,040,713	\$ 3,247,725
Cash and cash equivalents - operating partnerships	179,277	45,031
Cash, tenant security deposits	43,878	44,564
Cash, restricted - corporate operations	71,228	137,980
Investments - corporate operations	250,000	-
Accounts receivable, net - corporate operations	27,776	-
Accounts receivable, net - operating partnerships	25,091	184,265
Pledges receivable, net	57,405	30,000
Grants receivable	154,595	122,816
Prepaid expenses and other assets	<u>384,284</u>	<u>171,497</u>
Total current assets	<u>3,234,247</u>	<u>3,983,878</u>
Net property and equipment - corporate operations	3,534,432	3,256,949
Net property and equipment - operating partnerships	<u>24,238,959</u>	<u>25,368,826</u>
Total property and equipment	<u>27,773,391</u>	<u>28,625,775</u>
Other long-term assets		
Investments, restricted - corporate operations	1,013,653	87,580
Restricted property reserves - operating partnerships	1,559,769	1,590,203
Notes and interest receivable	1,410,051	1,375,075
Other assets, net - operating partnerships	<u>82,383</u>	<u>123,600</u>
Total other long-term assets	<u>4,065,856</u>	<u>3,176,458</u>
Total assets	<u><u>\$ 35,073,494</u></u>	<u><u>\$ 35,786,111</u></u>

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidated Statements of Financial Position**  
**June 30, 2022 and 2021**

	<u>2022</u>	<u>2021</u>
Liabilities		
Current liabilities		
Accounts payable and accrued expenses - corporate operations	\$ 103,395	\$ 54,518
Accounts payable and accrued expenses - operating partnerships	360,410	378,422
Due to affiliates	4,551	-
Current portion of notes payable - corporate operations	-	30,497
Current portion of notes payable - operating partnerships	38,970	34,930
Deferred revenue and other liabilities	333,950	263,627
Tenant security deposits - operating partnerships	70,144	66,694
Total current liabilities	<u>911,420</u>	<u>828,688</u>
Long-term liabilities		
Accrued interest	117,927	105,135
Notes payable, less current portion, net - corporate operations	1,788,947	2,034,750
Notes payable, less current portion, net - operating partnerships	2,755,925	2,790,671
Deferred revenue and other liabilities	739,125	938,098
Total long-term liabilities	<u>5,401,924</u>	<u>5,868,654</u>
Total liabilities	<u>6,313,344</u>	<u>6,697,342</u>
Commitments and contingencies	-	-
Net assets without donor restrictions		
Net assets without donor restrictions, controlling	7,858,714	7,503,785
Net assets without donor restrictions, controlling - operating partnerships	6,864,089	7,165,062
Net assets without donor restrictions, noncontrolling	13,237,781	13,988,893
Total net assets without donor restrictions	27,960,584	28,657,740
Net assets with donor restrictions	799,566	431,029
Total net assets	<u>28,760,150</u>	<u>29,088,769</u>
Total liabilities and net assets	<u>\$ 35,073,494</u>	<u>\$ 35,786,111</u>

See Notes to Consolidated Financial Statements.

**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Statements of Activities  
Years Ended June 30, 2022 and 2021**

	2022			2021		
	Net Assets Without Donor Restrictions	Net Assets With Donor Restrictions	Total	Net Assets Without Donor Restrictions	Net Assets With Donor Restrictions	Total
<b>Revenues</b>						
Rent - net of vacancies	\$ 1,620,408	\$ -	\$ 1,620,408	\$ 1,506,898	\$ -	\$ 1,506,898
Service fees	68,083	-	68,083	17,500	-	17,500
Philanthropy	1,241,455	-	1,241,455	1,431,957	-	1,431,957
Grants	1,535,184	1,329,991	2,865,175	1,882,051	800,888	2,682,939
Interest	61,451	-	61,451	48,980	-	48,980
Unrealized (loss) gain on investments	(13,927)	-	(13,927)	12,465	-	12,465
Other	571,968	-	571,968	528,433	-	528,433
Release of restricted net assets	961,454	(961,454)	-	1,074,666	(1,074,666)	-
<b>Total revenues</b>	<b>6,046,076</b>	<b>368,537</b>	<b>6,414,613</b>	<b>6,502,950</b>	<b>(273,778)</b>	<b>6,229,172</b>
<b>Expenses and losses</b>						
Compensation	2,439,272	-	2,439,272	1,961,497	-	1,961,497
Administrative	1,398,478	-	1,398,478	1,024,855	-	1,024,855
Professional services	112,394	-	112,394	110,022	-	110,022
Depreciation and amortization	1,539,279	-	1,539,279	1,556,769	-	1,556,769
Facility	1,105,933	-	1,105,933	1,184,579	-	1,184,579
Interest and fees	128,843	-	128,843	157,633	-	157,633
Project expenses	19,033	-	19,033	10,179	-	10,179
<b>Total expenses and losses</b>	<b>6,743,232</b>	<b>-</b>	<b>6,743,232</b>	<b>6,005,534</b>	<b>-</b>	<b>6,005,534</b>
<b>Change in net assets</b>						
Consolidated	(697,156)	368,537	(328,619)	497,416	(273,778)	223,638
Attributable to noncontrolling interest	(751,112)	-	(751,112)	(792,343)	-	(792,343)
<b>Change in net assets attributable to Family Scholar House, Inc.</b>	<b>\$ 53,956</b>	<b>\$ 368,537</b>	<b>\$ 422,493</b>	<b>\$ 1,289,759</b>	<b>\$ (273,778)</b>	<b>\$ 1,015,981</b>

See Notes to Consolidated Financial Statements.

**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Statements of Changes in Net Assets  
Years Ended June 30, 2022 and 2021**

	<u>Net Assets Without Donor Restrictions</u>			<u>Net Assets With Donor Restrictions</u>	<u>Total Net Assets</u>
	<u>Controlling</u>	<u>Noncontrolling</u>	<u>Total</u>		
Balance, July 1, 2020	\$ 11,859,951	\$ 16,300,373	\$ 28,160,324	\$ 704,807	\$ 28,865,131
Transfer of net assets	1,519,137	(1,519,137)	-	-	-
Change in net assets	<u>1,289,759</u>	<u>(792,343)</u>	<u>497,416</u>	<u>(273,778)</u>	<u>223,638</u>
Balance, June 30, 2021	14,668,847	13,988,893	28,657,740	431,029	29,088,769
Change in net assets	<u>53,956</u>	<u>(751,112)</u>	<u>(697,156)</u>	<u>368,537</u>	<u>(328,619)</u>
Balance, June 30, 2022	<u>\$ 14,722,803</u>	<u>\$ 13,237,781</u>	<u>\$ 27,960,584</u>	<u>\$ 799,566</u>	<u>\$ 28,760,150</u>

See Notes to Consolidated Financial Statements.

**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Statement of Functional Expenses**

**Year Ended June 30, 2022**

	Program Services	General and Administrative	Fundraising	Operating Partnerships	Total
Assistance Payments	\$ 470,556	\$ -	\$ -	\$ -	\$ 470,556
Automobile Expense	28,501	-	-	5	28,506
Depreciation and Amortization	190,584	16,151	-	1,332,544	1,539,279
Employee Benefits	199,941	3,124	6,462	-	209,527
Employee Training	30,881	-	-	1,441	32,322
Insurance	16,904	24,555	-	110,691	152,150
Interest and Other Expenses	2,232	-	-	126,611	128,843
Legal and Accounting	-	33,906	-	141,732	175,638
Miscellaneous	117,389	96,421	-	14,370	228,180
Newsletter	-	-	6,173	-	6,173
Office Supplies	38,139	1,296	-	3,485	42,920
Payroll Tax	136,271	5,912	3,658	-	145,841
Printing and Postage	2,566	218	-	-	2,784
Professional Fees	8,000	-	22,000	6,440	36,440
Program Publications	269,728	-	-	-	269,728
Public Relations	-	-	15,656	-	15,656
Repairs and Maintenance	701	3,746	-	372,755	377,202
Salary and Wages	1,765,600	48,733	30,462	233,620	2,078,415
Telephone and Internet	45,046	3,089	-	46,009	94,144
Utilities	41,627	2,964	-	251,736	296,327
Management and Other Partnership Fees	-	-	-	93,154	93,154
Facility Expense	-	-	-	105,681	105,681
Administrative Expenses	-	9,409	-	31,512	40,921
Bad Debt Expense	-	-	-	172,845	172,845
Total expenses	<u>\$ 3,364,666</u>	<u>\$ 249,524</u>	<u>\$ 84,411</u>	<u>\$ 3,044,631</u>	<u>\$ 6,743,232</u>

See Notes to Consolidated Financial Statements.

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidated Statement of Functional Expenses**  
**Year Ended June 30, 2021**

	Program Services	General and Administrative	Fundraising	Operating Partnerships	Total
Assistance Payments	\$ 384,330	\$ -	\$ -	\$ 54,608	\$ 438,938
Automobile Expense	5,163	34	-	142	5,339
Depreciation and Amortization	192,888	14,909	-	1,348,972	1,556,769
Employee Benefits	153,782	3,346	1,710	-	158,838
Employee Training	18,556	-	-	1,738	20,294
Insurance	10,828	7,168	-	176,298	194,294
Interest and Other Expenses	22,918	-	-	134,715	157,633
Legal and Accounting	-	39,845	-	157,476	197,321
Miscellaneous	71,590	1,215	-	77,740	150,545
Newsletter	-	-	2,412	-	2,412
Office Supplies	41,791	1,520	-	5,329	48,640
Payroll Tax	112,578	4,970	3,337	43,859	164,744
Printing and Postage	2,184	245	-	-	2,429
Professional Fees	3,750	-	24,000	32,782	60,532
Program Publications	196,212	-	-	-	196,212
Public Relations	-	-	13,487	-	13,487
Repairs and Maintenance	5,617	2,007	-	399,530	407,154
Salary and Wages	1,357,743	47,765	29,749	126,652	1,561,909
Telephone and Internet	33,712	2,286	-	69,655	105,653
Utilities	29,224	1,481	-	285,014	315,719
Management and Other Partnership Fees	-	-	-	74,024	74,024
Facility Expense	-	3,750	-	46,298	50,048
Administrative Expenses	-	-	-	5,112	5,112
Bad Debt Expense	-	-	-	117,488	117,488
Total expenses	<u>\$ 2,642,866</u>	<u>\$ 130,541</u>	<u>\$ 74,695</u>	<u>\$ 3,157,432</u>	<u>\$ 6,005,534</u>

See Notes to Consolidated Financial Statements.

**Family Scholar House, Inc. and Subsidiaries**

**Consolidated Statements of Cash Flows**  
**Years Ended June 30, 2022 and 2021**

	<u>2022</u>	<u>2021</u>
Operating activities		
Changes in net assets	\$ (328,619)	\$ 223,638
Adjustments to reconcile changes in net assets to net cash provided by operating activities		
Depreciation and amortization	1,539,279	1,556,769
Amortization of deferred financing fees	3,813	4,565
Unrealized loss (gain) on investment	13,927	(12,465)
Forgiveness of debt	(482,092)	(421,692)
Net changes in current assets and liabilities that provided (used) cash		
Accounts receivable, net	131,398	(30,767)
Pledges receivable, net	(27,405)	(8,420)
Grants receivable	(31,779)	(103,503)
Prepaid expenses and other assets	(212,787)	(63,728)
Accounts payable	52,258	110,803
Accrued interest payable	12,792	4,390
Deferred revenue	77,142	22,773
Tenant security deposits liability	3,450	830
Net cash provided by operating activities	<u>751,377</u>	<u>1,283,193</u>
Investing activities		
Net change in property and equipment	(662,520)	(182,092)
Purchase of investments	(1,190,000)	-
Proceeds from investments	(15,556)	40,670
Net change in restricted property reserves - operating partnerships	7,778	(20,335)
Net change in notes receivable	(34,976)	(34,976)
Net cash used in investing activities	<u>(1,895,274)</u>	<u>(196,733)</u>
Financing activities		
Proceeds from notes payable	-	276,300
Principal payments on notes payable	(34,519)	(788,923)
Net cash used in financing activities	<u>(34,519)</u>	<u>(512,623)</u>
Net (decrease) increase in cash, cash equivalents and restricted cash	(1,178,416)	573,837
Cash, cash equivalents, and restricted cash, beginning	<u>5,027,169</u>	<u>4,453,332</u>
Cash, cash equivalents, and restricted cash, end	<u>\$ 3,848,753</u>	<u>\$ 5,027,169</u>
Cash paid for interest	<u>\$ 111,088</u>	<u>\$ 148,678</u>
Noncash investing and financing activities:		
Increase in property and equipment in accounts payable	\$ 16,842	\$ -
Increase in accounts payable from property and equipment purchases	(16,842)	-
Total noncash investing and financing activities	<u>\$ -</u>	<u>\$ -</u>

See Notes to Consolidated Financial Statements.

## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

#### **Note 1 - Nature of activities**

Family Scholar House, Inc. ("FSH" or the "Organization") is a not-for-profit, community-based collaborative effort, headquartered in Louisville, Kentucky, which assists single parents, young adults formerly in foster care and other vulnerable populations in obtaining post-secondary education that leads to a livable wage. FSH works to end the cycle of poverty and transform our communities by empowering families and youth to succeed in education and achieve life-long self-sufficiency. FSH accomplishes this mission through providing holistic support for participants. This begins with needs assessment and continues with success coaching to ensure students, who may have been away from the educational environment for some time, develop the skills and leverage the tools to make them successful in their educational and career endeavors. Care management is also an integral component of the FSH support services. Residential participants meet with care managers twice monthly to identify any challenges for the family and are provided with resources to overcome those challenges. Others have access to programs and services as needed. Many of the participants come to FSH lacking some of the basic life skills necessary for them to be self-sufficient, including financial literacy, healthful behaviors, stress management, and physical and mental wellbeing. Recognizing the evolving challenges of labor shortages and workforce needs as well as the changes brought by the pandemic, FSH has developed programs responsive to what participants need and how best to be available to them. In addition to affordable housing, and residential programming, newer programs include the Trager Response Center for on-demand coaching and advocacy and MyKY.info, FSH's mobilized web-app providing free resources in both English and Spanish across the Commonwealth of Kentucky. FSH engages volunteers throughout the communities served to share expertise with participants in key areas and build relationships. FSH complements paid staff and interns by leveraging volunteers to create the continuum of service necessary for FSH participants to succeed. While the young adult and parent scholar are at the center of many programs of FSH, the children scholars also receive the support and resources they need to become successful students and aspire to proceed to higher education in their adult life. This includes two-generation programs such as Toddler Book Club, Children for Change, and summer career and leadership camps. FSH creates a college-going culture for every participant in the program and defines college broadly to include credentialing, apprenticeships, and trades, as well as two- and four-year college experiences. The continuum of care described above is available for all participants. As housing units become available, some participants and their families are able to reside at one of the FSH campuses. Currently, there are five campuses in Louisville, Kentucky, with a total of 279 affordable apartments. These campuses become communities of peer support, providing a network of people with similar backgrounds and experiences who strengthen and encourage one another through the challenges of higher education and life. Thus, Family Scholar House, Inc. is an education and workforce program with a housing component that utilizes internal resources and community collaborations to meet the needs of the individuals and families served. FSH is supported primarily through donor contributions, grants, and fund-raising activities.

#### **Note 2 - Significant accounting policies**

##### **Principles of consolidation**

The consolidated financial statements include the accounts of the Family Scholar House and its wholly-owned subsidiaries, collectively referred to as the Corporate Operations:

Project Women Development, LLC ("PWD") is a single member limited liability company, which was formed in February 2008, and whose purpose is to consult and manage the construction of the Family Scholar House property.



## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

DSH GP, Inc. is a wholly-owned for-profit corporation, which was formed in March 2010 for the purpose of being the general partner in Downtown Scholar House, LLLP.

SJSH GP, LLC is a single member limited liability company, which was formed in December 2010 for the purpose of being the general partner in Stoddard-Johnston Scholar House, LLLP.

Parkland GP, LLC is a single member limited liability company, which was formed in December 2012 for the purpose of being the general partner in Parkland Scholar House, LLLP.

Louisville Scholar House, LLC (the "Company") was formed to fund construction of 56 independent living apartments and a child development center in Louisville, Kentucky. Construction was completed in August 2008. National City Community Development Corporation was the investor member owning a 99.99% Company interest, in exchange for a loan commitment of approximately \$7,035,000 to the Company, and has received low-income tax credits generated by the Company. During 2021, the investor member assigned its rights to the manager.

The accompanying consolidated financial statements also include the accounts of the Organization's investments in limited partnerships or limited liability companies in which Family Scholar House, Inc. has a controlling interest. These entities are included in the consolidation according to generally accepted accounting principles ("GAAP") which require the partnership accounts be consolidated for all limited partnerships or limited liability companies which are deemed to be controlled by the Organization. All intercompany transactions have been eliminated in consolidation.

The following entities are included in the consolidated financial statements of the Organization, collectively known as Operating Partnerships:

Downtown Scholar House, LLLP (the "Partnership") was formed to fund the rehabilitation and construction of 54 independent living apartments in Louisville, Kentucky. The construction of the apartments was completed in January 2011. Ohio Equity Fund for Housing Limited Partnership XXIII is the limited partner owning a 99.9% partnership interest, in exchange for an equity commitment of approximately \$3,003,000 to the DSH Partnership, and has received low-income tax credits generated by the Partnership. Additional financing to complete construction of this project is being provided by grants and loans from governmental agencies.

Stoddard Johnston Scholar House, LLLP (the "Partnership") was formed to fund the rehabilitation and construction of 57 independent living apartments in Louisville, Kentucky through certain tax credits generated by the SJSH Partnership along with various grants and loans from government agencies. The construction of the apartments was completed in March 2012. PNC Bank, NA, is the limited partner owning a 99.99% partnership interest, in exchange of an equity commitment of approximately \$9,309,000 to the Partnership, and has received low-income tax credits generated by the Partnership.

Parkland Scholar House, LLLP (the "Partnership") was formed to fund the rehabilitation and construction of 48 independent living apartments in Louisville, Kentucky through certain tax credits generated by the Parkland Partnership along with various grants and loans from government agencies. The construction of the apartments was completed in August 2013. PNC Bank, NA, is the limited partner owning a 99.9% partnership interest, in exchange of an equity commitment of approximately \$8,500,000 and is to receive low-income tax credits generated by the Partnership.

## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

#### **Basis of accounting**

The consolidated financial statements of the Organization are prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America ("GAAP"). The Accounting Standards Codification ("ASC") as produced by the Financial Accounting Standards Board ("FASB") is the sole source of authoritative GAAP for nongovernmental entities.

#### **Revenue recognition**

Rental income, principally from short-term leases on apartment units is recognized as the rentals become due.

The Organization recognizes gifts of cash and other assets as revenue without donor restrictions unless they are received with donor restrictions. Gifts with restrictions are reported as revenue with donor restrictions. When a donor restriction expires, that is, when a stipulated time restriction ends or a purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the Consolidated Statements of Activities as net assets released from restrictions.

Unconditional promises to give are recorded as revenue at estimated net realizable value. Conditional promises to give, this is, those with a measurable performance or other barrier, and a right of return are not recognized until the conditions on which they depend have been substantially met. Donor-restricted contributions whose restrictions are met in the same reporting period are reported as revenue without donor restrictions in the period of receipt. Unconditional promises to give with payments due in future periods are discounted to present value and reported as revenue with donor restrictions.

A portion of our revenue is derived from cost-reimbursable federal and state contracts and grants, which are conditional upon certain performance requirements and the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when we have incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as refundable advances in the Consolidated Statements of Financial Position. The Organization received cost-reimbursable grants of \$209,818 and \$513,178 that have not been recognized as of June 30, 2022 and 2021, respectively, because qualifying expenditures have not yet been incurred. No amounts have been received in advance under our federal and state contracts and grants.

Special event revenues are recognized when the event is held. Contributions received at or related to a special event are recorded as Philanthropy in the Consolidated Statements of Activities.

#### **Use of estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect amounts reported in the consolidated financial statements and accompanying notes. Actual results may differ from those estimates.

#### **Cash and cash equivalents**

The Organization considers all highly-liquid investments with maturities when purchased of three months or less, that are not designated for a specific purpose to be cash equivalents. The Organization typically maintains balances with its bank in excess of federally-insured limits.

## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

#### **Restricted cash**

Program participants have the option of making regular payments to a Participant Future Fund. These restricted funds are maintained by the Organization and disbursed to the participants at the completion of the program.

The Operating Partnerships are required to make monthly deposits for replacement reserves and taxes and insurance escrows in a separate account held by the project. The mortgagor for the Operating Partnership controls these escrow deposits.

#### **Investments**

This classification includes certificates of deposits, bonds, and shares of stock. Investments in marketable securities are reported at fair value. See note 5.

#### **Accounts receivable and bad debts**

An allowance for doubtful accounts is recorded when receivables are deemed uncollectible. The estimated losses are based on a review of the current status of existing receivables. As of June 30, 2022 and 2021, the allowance for doubtful accounts was \$13,962 and \$70,693, respectively.

#### **Property and equipment**

Property and equipment purchased by the Organization are stated at cost. Property and equipment donated to the Organization are stated at estimated fair value at the date of donation. The Organization's policy is to capitalize all long-lived assets with a cost greater than \$500. Depreciation of property and equipment is provided on the straight-line basis over the estimated useful lives of the assets ranging from 3 to 40 years.

#### **Predevelopment project costs**

The Organization incurs costs in connection with properties it is considering for development as well as costs associated with properties in the initial stages of development. These costs include such items as market and environmental studies, purchase options, and legal and accounting costs. Predevelopment costs are capitalized until such time as the project is either abandoned or becomes an approved project with independent funding sources. Predevelopment project costs are written off when a potential project is no longer considered desirable or feasible.

#### **Impairment of long-lived assets**

In accordance with GAAP, management continually monitors events and changes in circumstances, which could indicate that the carrying value of real estate may not be recoverable. If events or changes in circumstances are present, management assesses the recoverability of real estate by determining whether the carrying value will be recovered through the undiscounted future cash flows expected to be generated from its uses and eventual disposition. If the carrying amount of the real estate exceeds its estimated undiscounted cash flows, the impairment to be recognized is measured by the amount of its carrying value of the real estate that exceeds its fair value. No impairment loss has been recognized during the years ended June 30, 2022 and 2021.

#### **Debt issuance costs**

Debt issuance costs, net of accumulated amortization, are reported as a direct deduction from the face amount of the mortgage and notes payable to which such costs relate. Amortization of debt issuance costs is reported as a component of interest expense and is computed using an imputed interest rate on the related loan.

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

#### **Tax credit fees and intangible assets amortization**

Tax credit monitoring fees are being amortized using the straight-line method over the 15-year tax credit compliance period. Intangible assets are being amortized over the useful lives of the intangible ranging from 3 to 10 years.

Amortization expense for the years ended June 30, 2022 and 2021 was \$41,217 and \$41,135, respectively. Estimated amortization expense for each of the ensuing years through June 30, 2027 is as follows:

2023	\$	16,743
2024		16,087
2025		16,087
2026		12,980
2027		8,073

#### **Basis of presentation and net assets**

GAAP requires the Organization to report information regarding its financial position and activities according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. Program service expenses must be segregated from management and general expenses. Contributions received are recorded as support without donor restrictions or with donor restrictions. Net assets without donor restrictions are those that have no external restrictions. Net assets with donor restrictions are those net assets for which use is limited by donors to a specific time period and/or purpose of for which use is restricted in perpetuity by donors.

#### **Noncontrolling interest in operating partnerships**

This represents the aggregate balance of limited partner or investor member equity interests in the nonwholly-owned limited partnerships or limited liability companies that are included in the consolidated financial statements.

#### **Net assets without donor restrictions**

Net assets without donor restrictions are available for use at the discretion of the board of trustees and/or management for general operating purposes. From time to time the board designates a portion of these net assets for specific purposes which makes them unavailable for use at management's discretion.

#### **Net assets with donor restrictions**

Net assets with donor restrictions consists of assets whose use is limited by donor-imposed, time and/or purpose restrictions.

FSH reports gifts of cash and other assets as revenue with donor restrictions if they are received with donor stipulations that limit the use of the donated assets. When a donor restriction expires, that is, when a stipulated time or purpose restriction is accomplished, the net assets are reclassified as net assets without donor restrictions and reported in the consolidated statements of activities as net assets released from restrictions.

See Note 12 for more information on the composition of net assets with donor restrictions.

## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

#### **Income tax status**

FSH and its consolidated nonprofit corporations are exempt from federal and state income taxes under Section 501(c)(3) of the Internal Revenue Code and comparable state statutes. FSH did not have any unrelated business income for the years ended June 30, 2022 and 2021. All nonprofit corporations are required to file tax returns with the IRS and other taxing authorities. Accordingly, these consolidated financial statements do not reflect a provision for income taxes and there are no other tax positions which must be considered for disclosure. For the years ended June 30, 2022 and 2021, the Organization did not identify any uncertain tax positions that qualify for either recognition or disclosure in the consolidated financial statements.

DSH GP, Inc. is a corporation subject to income taxes. No income taxes were due and payable for the years ended December 31, 2021 and 2020.

The Operating Partnerships in which the Organization has an ownership interest have elected to be treated as pass-through entities for income tax purposes and, as such, are not subject to income taxes. Rather, all items of taxable income, deductions and tax credits are passed through to and are reported by their owners on their respective income tax returns. The Operating Partnerships' federal tax statuses are based on their legal status as a partnership or a limited liability company. Accordingly, the Operating Partnerships are not required to take any tax positions in order to qualify as a pass-through entity. The Operating Partnerships are required to file and do file tax returns with the Internal Revenue Service and other taxing authorities. Accordingly, these financial statements do not reflect a provision for income taxes and the Operating Partnerships have no other tax positions which must be considered for disclosure.

Income tax returns filed by the Organization and its consolidated entities are subject to examination by the Internal Revenue Service for a period of three years. While no income tax returns are currently being examined by the Internal Revenue Service, tax years since 2018 remain open.

#### **Contributed services, supplies and property**

Certain contributed services, supplies, and property are recorded as support and expenses or a related asset at fair value when determinable, otherwise at values indicated by the donor. The Organization received contributed services, supplies, and property of \$17,365 and \$47,272, respectively, during the years ended June 30, 2022 and 2021.

#### **Functional allocation of expenses**

The costs of providing the various programs, general and administrative, fundraising, and operating partnerships have been summarized on a functional basis in the consolidated statements of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

The cost of providing the Organization's programs and other activities is summarized on a functional basis. Expenses that can be identified with a specific program or support service are charged directly to that program or support service. Costs common to multiple functions have been allocated among the various functions benefited using the proportion of full-time employee equivalents of a program service versus the total organizational full-time employee equivalents.

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

General and administrative expense include those costs that are not directly identifiable with any specific program, but which provide for the overall support and direction of the Organization. General and administrative activities include those that provide governance (Board of Directors), oversight, business management, financial recordkeeping, budgeting, legal services, human resource management, and similar activities that ensure an adequate working environment and an equitable employment program.

Fundraising activities include publicizing and conducting fundraising campaigns; maintaining donor lists; conducting special fundraising events; and other activities involved with soliciting contributions from corporations, foundations, individuals, and others. Fundraising costs, including advertising, are expensed as incurred, even those they may result in contributions received in future years.

Operating partnerships expenses include those costs that are directly related to the operations of the properties.

#### Reclassifications

Reclassifications have been made to the prior year balances to conform to the current year presentation.

#### Note 3 - Liquidity and availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use within one year of the statement of financial position date, comprise the following:

	2022	2021
Cash and cash equivalents - corporate operations	\$ 2,040,713	\$ 3,247,725
Cash and cash equivalents - operating partnerships	179,277	45,031
Cash, restricted - corporate operations	71,228	137,980
Investments - corporate operations	250,000	-
Accounts receivable, net - corporate operations	27,776	-
Accounts receivable, net - operating partnerships	25,091	184,265
Pledges receivable, net	57,405	30,000
Grants receivable	154,595	122,816
Net assets with donor restrictions included in cash and cash equivalents	(799,566)	(431,029)
Total assets available	<u>\$ 2,006,519</u>	<u>\$ 3,336,788</u>

As part of FSH's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities and other obligations become due. Cash utilized by the parent organization, in excess of daily requirements, is invested in short-term investments and money market funds.

#### Note 4 - Cash and deposits

Cash and deposits are categorized as unrestricted, which include board-designated amounts for a specific purpose, or restricted. Unrestricted cash held by the Operating Partnerships is generally not available for corporate purposes but is instead limited for use within individual properties.

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

At June 30, 2022 and 2021, cash and deposits were as follows:

	2022	2021
Unrestricted cash - corporate operations	\$ 2,040,713	\$ 3,247,725
Restricted cash - corporate operations	71,228	137,980
Total cash - corporate operations	<u>\$ 2,111,941</u>	<u>\$ 3,385,705</u>
Unrestricted cash - operating partnerships	\$ 179,277	\$ 45,031
Restricted cash - tenant security deposits - operating partnerships	43,878	44,564
Restricted cash - properties		
Restricted cash - restricted property reserves operating partnerships	<u>1,559,769</u>	<u>1,590,203</u>
Total cash - operating partnerships	<u>\$ 1,782,924</u>	<u>\$ 1,679,798</u>

#### Note 5 - Fair value

The Organization uses fair value to measure certain assets and liabilities. Fair value should be based on the assumptions that market participants would use when pricing the asset or liability, and establishes the following fair value hierarchy:

- Level 1 inputs utilize quoted prices (unadjusted) in active markets for identical assets or liabilities that the Organization has the ability to access;
- Level 2 inputs may include quoted prices for similar assets and liabilities in active markets, as well as interest rates and yield curves that are observable at commonly quoted intervals; and
- Level 3 inputs are unobservable inputs for the asset or liability that are typically based on an entity's own assumptions as there is little, if any, related market activity.

In instances where the determination of the fair value measurement is based on inputs from different levels of the fair value hierarchy, the fair value measurement will fall within the lowest level input that is significant to the fair value measurement in its entirety.

The Organization carries its certificates of deposits, bonds, and shares of stock at fair value. The fair value of these instruments is determined using a three-tier fair value hierarchy. Based on this hierarchy, the Organization determined the fair value of its certificates of deposits, bonds, and shares of stocks using quoted market prices, a Level 1 or an observable input. At June 30, 2022 and 2021, the Organization's investments had a fair value and carrying amount of \$1,263,653 and \$87,580, respectively.

**Family Scholar House, Inc. and Subsidiaries**

**Notes to Consolidated Financial Statements  
June 30, 2022 and 2021**

**Note 6 - Pledges and grants receivable**

Pledges and grants receivable consist of unconditional promises to give. As of June 30, 2022 and 2021, \$212,000 and \$152,816, respectively, remain receivable. As of June 30, 2022 future maturities are as follows:

2022	\$	212,000
2023		-
2024		-
2025		-
2026		-
Thereafter		-
Total pledge receivable		<u>\$ 212,000</u>

The valuation of pledges and grants receivable is based upon a detail analysis of past due accounts and the history of uncollectible accounts. At June 30, 2022 and 2021, the Organization considers all pledges and grants receivable to be fully collectible; accordingly, no allowance for uncollectible pledges and grants was recorded.

**Note 7 - Property and equipment**

Property and equipment consists of the following at June 30, 2022 and 2021:

	<u>2022</u>	<u>2021</u>
Land and land improvements	\$ 2,541,467	\$ 2,482,114
Buildings	39,237,001	39,165,979
Furniture and equipment	2,007,758	1,554,648
Predevelopment project costs	<u>62,193</u>	<u>-</u>
Total property and equipment	43,848,419	43,202,741
Less accumulated depreciation	<u>(16,075,028)</u>	<u>(14,576,966)</u>
Property and equipment, net	<u>\$ 27,773,391</u>	<u>\$ 28,625,775</u>

Depreciation expense for the years ended June 30, 2022 and 2021 was \$1,498,062 and \$1,515,634, respectively.



**Family Scholar House, Inc. and Subsidiaries**

**Notes to Consolidated Financial Statements  
June 30, 2022 and 2021**

**Note 8 - Property management fee**

The Operating Partnerships entered into management agreements with Beacon Property Management for the management of the rental operations of the properties beginning March 1, 2020. The Beacon Property Management charges a monthly fee of \$35 per occupied unit or 6% of monthly rents collected, as defined. During the years ended June 30, 2022 and 2021, \$84,269 and \$65,388 of the management fees have been charged to operations, respectively.

**Note 9 - American Recovery and Reinvestment Act ("ARRA")**

On May 17, 2010, Downtown Scholar House, LLLP entered into a \$3,086,874 note payable with the Kentucky Housing Corporation, which was funded through the Tax Credit Exchange Program ("TCEP") pursuant to Section 1602 of the American Recovery and Reinvestment Act of 2009. Under Section 1602, state housing agencies can exchange allocations of low-income housing tax credits ("LIHTC") which have been allocated to their state under Section 42 of the Internal Revenue Code ("Section 42") for cash at a prescribed rate of up to \$.85 for each dollar of LIHTC. In turn, the state housing agencies can use Section 1602 funds to make forgivable loans to properties that qualify for LIHTC.

Downtown Scholar House, LLLP's loan does not bear interest and matures on November 15, 2026. Under the loan agreement, loan principal is forgiven annually at the rate of 6.67% over the 15-year tax credit compliance period. Forgiveness is subject to Downtown Scholar House, LLLP maintaining compliance with Section 42. During the years ended June 30, 2022 and 2021, Downtown Scholar House, LLLP recognized \$205,792 and \$205,792, respectively, as income from debt forgiveness. As of June 30, 2022 and 2021, the outstanding balance of this note was \$926,062 and \$1,131,854, respectively.

The note is secured by a mortgage on the rental property and assignment of leases and rents.

**Family Scholar House, Inc. and Subsidiaries**

**Notes to Consolidated Financial Statements  
June 30, 2022 and 2021**

**Note 10 - Notes payable**

Notes payable consists of the following at June 30, 2022 and 2021:

	<u>2022</u>	<u>2021</u>
Forgivable loan from a government agency, collateralized by a mortgage and regulatory agreement, bearing 0% interest. The note will be forgiven in full at its maturity in December 2040 as long as the Organization maintains compliance with the affordability requirements in the funding commitment agreement.	\$ 1,000,000	\$ 1,000,000
Note payable to a government agency, collateralized by a mortgage and regulatory agreement, bearing interest at 1%. Principal and interest are payable on or before the maturity date in December 2030. Interest may be paid yearly. For the years ended June 30, 2022 and 2021, interest expense of \$2,232 and \$4,464, respectively, was charged to operations.	288,947	288,947
Forgivable loan from a government agency, collateralized by a mortgage and regulatory agreement, bearing 0% interest. The note will be forgiven in full at its maturity in February 2032 as long as the Organization maintains compliance with the affordability requirements in the funding commitment agreement.	500,000	500,000
Note payable to Citizens Union Bank due in September 2026 at an interest rate of 7.5%. Monthly payments of principal and interest of \$9,734 began in 2013. The loan is secured by a first mortgage lien on the rental property. For the years ended June 30, 2022 and 2021, interest expense of \$70,986 and \$72,527, respectively, was charged to operations.	924,777	942,704
Note payable to PNC Bank due in January 2027 at interest rate of 5.75% with monthly payments of principal and interest of \$5,054. The balance payable at June 30, 2022 and 2021 is \$746,524 and \$763,116, respectively. Unamortized debt issuance costs as of June 30, 2022 and 2021 are \$16,406 and \$20,219, respectively. The loan is secured by a first mortgage lien on the rental property. For the years ended June 30, 2022 and 2021, interest expense of \$52,625 and \$54,188, respectively, was charged to operations. Debt issuance costs are amortized based on an imputed interest rate of 5.88%.	746,524	763,116

**Family Scholar House, Inc. and Subsidiaries**

**Notes to Consolidated Financial Statements  
June 30, 2022 and 2021**

	<u>2022</u>	<u>2021</u>
Note payable to CDBG at an interest rate of 1% due on December 31, 2030. The note is secured by a second mortgage on the rental property. For the years ended June 30, 2022 and 2021, interest expense of \$3,000 and \$3,000, respectively, was charged to operations.	300,000	300,000
HOME note payable to the Louisville/Jefferson County Metro Government at an interest rate of 1%, due in February 2031. For the years ended June 30, 2022 and 2021, interest expense of \$5,000 and \$5,000, respectively, was charged to operations.	500,000	500,000
Note payable to Louisville Metro Housing Authority, without interest, due in March 2056. If the note is not paid on or before the maturity date, the note shall thereafter bear interest on the outstanding principal balance at an annual rate of 10% until paid. For the years ended June 30, 2022 and 2021, no interest expense was charged to operations.	340,000	340,000
Paycheck Protection Program note payable to Republic Bank & Trust Company, which is forgivable if used for certain qualifying expenses over a 24 week period. For the years ended June 30, 2022 and 2021, no interest expense was charged to operations. The full amount of the loan of \$276,300 was forgiven on July 26, 2021 and included in other revenue on the consolidated statements of activities.	-	276,300
	<u>\$ 4,600,248</u>	<u>\$ 4,911,067</u>

Future maturities of notes payable are as follows:

For the year ended June 30, 2023	\$ 38,970
2024	40,659
2025	43,471
2026	48,388
2027	1,500,751
Thereafter	<u>2,928,009</u>
	4,600,248
Less: net loan fees	<u>(16,406)</u>
	<u>\$ 4,583,842</u>

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

#### Note 11 - Notes receivable

On February 10, 2016, the Organization entered into a loan agreement with Riverport FSH LLC, in the original amount of \$1,262,000. The loan bears interest at 2.81% compounded annually. Principal and interest shall be deferred and payable until the sooner of February 1, 2049 and the date in which the Lender acquires the Premises in accordance with Lease. Interest income for the years ended June 30, 2022 and 2021 amounted to \$34,976 and \$34,976, respectively, of which, \$148,051 and \$113,075 remains receivable at June 30, 2022 and 2021. The principal balance outstanding at June 30, 2022 and 2021 amounted to \$1,262,000 and \$1,262,000, respectively.

#### Note 12 - Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2022 and 2021 are available for the following purposes:

	2022	2021
HEROES Campaign	\$ 192,567	\$ 146,898
Impact	114,000	-
Pathways to Equity	-	50,000
Cincinnati Area Affiliate Program	-	18,800
Preventing Homelessness Program	-	2,273
Houston Scholar House	127,823	-
Workforce Solutions and Response Center	125,000	-
Campus Startup	-	15,780
Robert Rounsavall Family Foundation	83,653	87,580
Allgeier Scholarship	8,257	8,257
Various other programs	148,266	101,441
	<u>\$ 799,566</u>	<u>\$ 431,029</u>

#### Note 13 - Related party transactions

The Organization has significant related party transactions with affiliates. It provides development services, fund raising assistance, resident and administrative services.

##### Notes and interest receivable, affiliates

The amounts loaned by the Organization primarily represent predevelopment and development loans to affiliates. These loans are generally collateralized with real estate of the funded property. These loans have been eliminated in consolidation.

##### Development fee income

Generally, all development fee income is earned in connection with affiliated entities. Development fees which are paid from operating cash flows from affiliated entities are eliminated in consolidation.

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

#### Investor service fee

The Limited Partner is entitled to receive a cumulative annual investor service fee as outlined in the Partnership Agreement for certain Operating Partnerships. The fee is payable to the extent of cash flow available for distribution. For the years ending June 30, 2022 and 2021, \$4,551 and \$4,303, respectively, were charged to operations. As of June 30, 2022 and 2021, \$4,551 and \$0, respectively, remains payable.

#### Note 14 - Statements of cash flows

The following table provides a reconciliation of cash, cash equivalents, and restricted cash reported within the statements of financial position that sum to the total of the same such amounts in the statements of cash flows:

	Consolidated	
	2022	2021
Cash and cash equivalents - corporate operations	\$ 2,040,713	\$ 3,247,725
Cash and cash equivalents - operating partnerships	179,277	45,031
Cash, tenant security deposits	43,878	44,564
Cash, restricted - corporate operations	71,228	137,980
Restricted property reserves - operating partnerships	1,513,657	1,551,869
Total cash, cash equivalents, and restricted cash shown on the statements of cash flows	<u>\$ 3,848,753</u>	<u>\$ 5,027,169</u>

Amounts included in restricted cash are comprised of security deposits held in trust for the future benefit of tenants upon moving out of the property and other reserves as required by regulatory authority and the partnership agreements.

#### Note 15 - Guarantor agreements

The Organization is the general partner in various limited partnerships for the purpose of purchasing, constructing, rehabilitating and operating low-income housing in the Louisville Metro area. As general partner, the Organization is obligated to guarantee amounts borrowed by the partnerships and lend amounts to the partnerships to avoid any cash flow deficits from partnership operations.

## Family Scholar House, Inc. and Subsidiaries

### Notes to Consolidated Financial Statements June 30, 2022 and 2021

#### Note 16 - Special events

The Organization held various fundraising events to raise awareness among the attendees and the local community as to the Organization's cause, and to solicit donations. Gross revenues and direct event expenses related to fundraising events during the years ended June 30, 2022 and 2021 were as follows are recorded as Philanthropy in the Consolidated Statements of Activities:

	2022	2021
Revenues	\$ 504,251	\$ 360,608
Expenses	(113,992)	(67,167)
	<u>\$ 390,259</u>	<u>\$ 293,441</u>

#### Note 17 - Retirement Plan

The Organization has a SIMPLE IRA plan to fund retirement for its employees. Effective January 1, 2021, the SIMPLE IRA plan was converted to a 401(k). The Organization matches employees' contributions up to 4% of their compensation. The Organization made contributions of \$37,697 and \$24,499 for the years ended June 30, 2022 and 2021, respectively.

#### Note 18 - Concentrations

During the year ended June 30, 2022, the Organization received 2.01% of its contribution revenue without donor restrictions from one donor. The single largest donor was \$25,000. During the year ended June 30, 2021, the Organization received 17.39% of its contribution revenue without donor restriction from one donor. The single largest donor was \$250,000. During the years ended June 30, 2022 and 2021, the Organization received 11.32% and 42.18%, respectively, of its grant revenue without donor restriction from one grantor agency.

During the years ended June 30, 2022 and 2021, the Organization received 75.19% and 48.12%, respectively, of its grant revenue with donor restriction from one grantor agency.

As of June 30, 2022 and 2021, 35.38% and 1.00%, respectively, of pledges and grants receivable was due from a single donor.

#### Note 19 - Commitments and contingencies

##### Property use restrictions

Several of the properties owned by the Organization were developed using monies provided by grants and restrictive, low interest rate loans. The terms of these loans restrict the use of the property and generally require it to be rented to low-income qualified tenants for the period of the grant or related loan term. Failure to comply with the terms of the grant or the loans would result in a requirement to repay a portion or all of the proceeds received.

##### Other

As the general partner in various partnerships, the Organization and other consolidated entities may be subject to other liabilities should an affected partnership's assets become insufficient to meet its obligations.

## **Family Scholar House, Inc. and Subsidiaries**

### **Notes to Consolidated Financial Statements June 30, 2022 and 2021**

The Organization has entered into an employment agreement with its President and Chief Executive Officer which provided for severance pay should she be terminated without cause. This commitment expires on June 30, 2027.

#### **Lease agreement**

The Organization entered into a lease agreement with Riverport FSH, LLC in February 2017 to lease the academic services building. The term of the lease is 17 years, commencing on the Delivery Date, as defined. The rent is \$1 annually. The lease commenced on July 16, 2018.

#### **COVID-19**

In early 2020, an outbreak of a novel strain of coronavirus ("COVID-19") emerged globally. As a result, events have occurred including mandates from federal, state and local authorities leading to an overall decline in economic activity which could result in a loss of lease revenue and other material adverse effects to the Organization's financial position, results of operations, and cash flows. The Organization is not able to estimate the length or severity of this outbreak and the related financial impact. The future impact of the outbreak is highly uncertain and cannot be predicted and there is no assurance that the outbreak will not have a material adverse impact on the financial health of the Organization. The extent of the impact, if any, will depend on future developments, including actions taken to contain the coronavirus. Management plans to adjust its operations accordingly and will continue to assess and monitor the situation as it evolves. If the length of the outbreak and related effects on our operations continue for an extended period of time, we may have to seek alternative measures to finance our operations. There is no assurance these measures will be successful.

#### **Note 20 - Subsequent events**

Events that occur after the Consolidated Statement of Financial Position date but before the consolidated financial statements were available to be issued must be evaluated for recognition or disclosure. The effects of subsequent events that provide evidence about conditions that existed at the Consolidated Statement of Financial Position date are recognized in the accompanying consolidated financial statements. Subsequent events which provide evidence about conditions that existed after the Consolidated Statement of Financial Position date require disclosure in the accompanying notes. Management evaluated the activity of the Organization through October 6, 2022 (the date the consolidated financial statements were available to be issued) and concluded that other than the events described below, no subsequent events have occurred that would require disclosure in the notes to the consolidated financial statements.

In July 2022, FSH was allocated and received \$1,000,000 from the Commonwealth of Kentucky budget to support FSH's operations.

On July 6, 2022, Downtown Scholar House, LLLP repaid the first mortgage and entered into a new loan agreement with Republic Bank & Trust Company in the principal amount of \$930,000.

On August 1, 2022, FSH. received a grant in the amount of \$2,848,805 from AmeriCorps.

## **Supplementary Information**



**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Financial Position**  
**June 30, 2022**

Assets	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLLP	Stoddard Johnston Scholar House, LLLP	Parkland Scholar House, LLLP	Eliminations	Consolidated Family Scholar House, Inc.
Current assets							
Cash and cash equivalents - corporate operations	\$ 2,040,713	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,040,713
Cash and cash equivalents - operating partnerships	-	85,499	25,769	66,160	1,849	-	179,277
Cash, tenant security deposits	-	12,569	9,696	11,598	10,015	-	43,878
Cash, restricted - corporate operations	71,228	-	-	-	-	-	71,228
Investments	250,000	-	-	-	-	-	250,000
Accounts receivable, net - corporate operations	27,776	-	-	-	-	-	27,776
Accounts receivable, net - operating partnerships	-	1,861	4,802	9,234	9,194	-	25,091
Due from affiliates	75,497	-	-	-	-	(75,497)	-
Pledges receivable, net	57,405	-	-	-	-	-	57,405
Grants receivable	154,595	-	-	-	-	-	154,595
Prepaid expenses and other assets	286,057	22,957	32,778	19,821	22,671	-	384,284
Total current assets	2,963,271	122,886	73,045	106,813	43,729	(75,497)	3,234,247
Property and equipment							
Land and land improvements							
Buildings	321,309	862,892	693,191	191,450	472,625	-	2,541,467
Furniture and equipment	3,645,227	11,254,151	7,828,820	10,332,014	7,905,286	(1,728,497)	39,237,001
Predevelopment project costs	1,161,572	67,747	246,925	318,794	212,720	-	2,007,758
Accumulated depreciation	62,193	-	-	-	-	-	62,193
	(1,655,869)	(5,361,990)	(2,609,813)	(4,262,168)	(2,962,920)	777,732	(16,075,028)
Net property and equipment	3,534,432	6,822,800	6,159,123	6,580,090	5,627,711	(950,765)	27,773,391
Other long-term assets							
Investments, restricted	1,013,653	-	-	-	-	-	1,013,653
Restricted property reserves - operating partnerships	-	61,853	522,346	562,569	413,001	-	1,559,769
Investments in limited partnerships, net	499,813	-	-	-	-	(499,813)	-
Notes and interest receivable, affiliates	2,175,009	-	-	-	-	(2,175,009)	-
Notes and interest receivable	1,410,051	-	-	-	-	-	1,410,051
Other assets, net - operating partnerships	7,280	3,543	12,514	28,613	30,433	-	82,383
Total other long-term assets	5,105,806	65,396	534,860	591,182	443,434	(2,674,822)	4,065,856
Total assets	\$ 11,603,509	\$ 7,011,082	\$ 6,767,028	\$ 7,278,085	\$ 6,114,874	\$ (3,701,084)	\$ 35,073,494

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Financial Position**  
**June 30, 2022**

	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLLP	Stoddard Johnston Scholar House, LLLP	Parkland Scholar House, LLLP	Eliminations	Consolidated Family Scholar House, Inc.
<b>Liabilities</b>							
<b>Current liabilities</b>							
Accounts payable and accrued expenses - corporate operations	\$ 103,395	\$ -	\$ 235,427	\$ -	\$ -	\$ -	\$ 103,395
Accounts payable and accrued expenses - operating partnerships	-	45,642	-	39,686	39,655	-	360,410
Due to affiliates	-	-	-	42,211	37,837	(75,497)	4,551
Current portion of notes payable - operating partnerships	-	-	20,301	18,669	-	-	38,970
Deferred revenue and other liabilities	124,922	-	209,028	-	-	-	333,950
Tenant security deposits - operating partnerships	29,254	10,884	9,400	11,805	8,801	-	70,144
<b>Total current liabilities</b>	<b>257,571</b>	<b>56,526</b>	<b>474,156</b>	<b>112,371</b>	<b>86,293</b>	<b>(75,497)</b>	<b>911,420</b>
<b>Long-term liabilities</b>							
Accrued interest	32,568	-	5,782	79,577	-	-	117,927
Accrued interest, affiliates	-	-	183,485	-	52,056	(235,541)	-
Notes payable, less current portion, net - corporate operations	1,788,947	-	-	-	-	-	1,788,947
Notes payable, less current portion, net - operating partnerships	-	-	904,476	1,851,449	-	-	2,755,925
Notes payable, less current portion, affiliates	-	-	1,766,329	69,925	103,214	(1,939,468)	-
Deferred revenue and other liabilities	-	5,845	720,270	5,503	7,507	-	739,125
<b>Total long-term liabilities</b>	<b>1,821,515</b>	<b>5,845</b>	<b>3,580,342</b>	<b>2,006,454</b>	<b>162,777</b>	<b>(2,175,009)</b>	<b>5,401,924</b>
<b>Total liabilities</b>	<b>2,079,086</b>	<b>62,371</b>	<b>4,054,498</b>	<b>2,118,825</b>	<b>249,070</b>	<b>(2,250,506)</b>	<b>6,313,344</b>
<b>Net assets without donor restrictions</b>							
Net assets without donor restrictions, controlling - corporate operations	8,724,857	-	-	-	-	(866,143)	7,858,714
Net assets without donor restrictions, controlling - operating partnerships	-	6,948,711	499,705	(1)	109	(584,435)	6,864,089
Net assets without donor restrictions, noncontrolling - operating partnerships	-	-	2,212,825	5,159,261	5,865,695	-	13,237,781
<b>Total net assets without donor restrictions</b>	<b>8,724,857</b>	<b>6,948,711</b>	<b>2,712,530</b>	<b>5,159,260</b>	<b>5,865,804</b>	<b>(1,450,578)</b>	<b>27,960,584</b>
<b>Net assets with donor restrictions</b>							
Net assets with donor restrictions	799,566	-	-	-	-	-	799,566
<b>Total net assets</b>	<b>9,524,423</b>	<b>6,948,711</b>	<b>2,712,530</b>	<b>5,159,260</b>	<b>5,865,804</b>	<b>(1,450,578)</b>	<b>28,760,150</b>
<b>Total liabilities and net assets</b>	<b>\$ 11,603,509</b>	<b>\$ 7,011,082</b>	<b>\$ 6,767,028</b>	<b>\$ 7,278,085</b>	<b>\$ 6,114,874</b>	<b>\$ (3,701,084)</b>	<b>\$ 35,073,494</b>

See Independent Auditor's Report.

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Activities**  
**and Changes in Net Assets**  
**Year Ended June 30, 2022**

	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLP	Stoddard Johnston Scholar House, LLP	Parkland Scholar House, LLP	Eliminations	Consolidated Family Scholar House, Inc.
<b>Revenues</b>							
Rent - net of vacancies	\$ -	\$ 455,592	\$ 375,204	\$ 458,547	\$ 331,065	\$ -	\$ 1,620,408
Service fees	87,802	-	-	-	-	(19,719)	68,083
Philanthropy	1,241,455	-	-	-	-	-	1,241,455
Grants	2,865,175	-	-	-	-	-	2,865,175
Interest	80,748	3	149	170	128	(19,747)	61,451
Unrealized (loss) on investments	(13,927)	-	-	-	-	-	(13,927)
Other	276,300	121,478	208,545	6,672	74,473	(115,500)	571,968
<b>Total revenues</b>	<b>4,537,553</b>	<b>577,073</b>	<b>583,898</b>	<b>465,389</b>	<b>405,666</b>	<b>(154,966)</b>	<b>6,414,613</b>
<b>Expenses and losses</b>							
Compensation	2,205,652	60,651	57,917	61,613	53,439	-	2,439,272
Administrative	1,272,956	74,667	83,661	46,399	56,014	(135,219)	1,398,478
Professional services	55,906	9,015	11,376	17,270	18,827	-	112,394
Depreciation and amortization	206,735	469,692	205,312	335,612	321,942	(14)	1,539,279
Facility	55,921	264,021	239,297	244,775	301,919	-	1,105,933
Interest and fees	2,232	-	88,256	55,625	2,477	(19,747)	128,843
Project expenses	14,699	-	4,334	-	-	-	19,033
Miscellaneous financial expense	84,622	-	-	-	-	(84,622)	-
<b>Total expenses and losses</b>	<b>3,898,723</b>	<b>878,046</b>	<b>690,153</b>	<b>761,294</b>	<b>754,618</b>	<b>(239,602)</b>	<b>6,743,232</b>
Change in net assets	638,830	(300,973)	(106,255)	(295,905)	(348,952)	84,636	(328,619)
Net assets at beginning of year	8,885,593	7,165,062	2,818,785	5,455,165	6,214,756	(1,450,592)	29,088,769
Net assets at end of year	<u>\$ 9,524,423</u>	<u>\$ 6,948,711</u>	<u>\$ 2,712,530</u>	<u>\$ 5,159,260</u>	<u>\$ 5,865,804</u>	<u>\$ (1,450,578)</u>	<u>\$ 28,760,150</u>

See Independent Auditor's Report.

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Financial Position**  
**June 30, 2021**

Assets	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLP	Stoddard Johnston Scholar House, LLP	Parkland Scholar House, LLP	Eliminations	Consolidated Family Scholar House, Inc.
<b>Current assets</b>							
Cash and cash equivalents - corporate operations	\$ 3,247,725	\$ -	\$ -	\$ -	\$ -	-	\$ 3,247,725
Cash and cash equivalents - operating partnerships	-	7,726	18,306	5,004	13,995	-	45,031
Cash, tenant security deposits	-	12,273	8,784	14,800	8,707	-	44,564
Cash, restricted - corporate operations	137,980	-	-	-	-	-	137,980
Accounts receivable, net - operating partnerships	-	36,973	60,524	41,042	45,726	-	184,265
Due from affiliate	171,278	-	-	-	-	(171,278)	-
Pledges receivable, net	30,000	-	-	-	-	-	30,000
Grants receivable	122,816	-	-	-	-	-	122,816
Prepaid expenses and other assets	81,682	17,970	33,631	19,278	18,936	-	171,497
<b>Total current assets</b>	<b>3,791,481</b>	<b>74,942</b>	<b>121,245</b>	<b>80,124</b>	<b>87,364</b>	<b>(171,278)</b>	<b>3,983,878</b>
<b>Property and equipment</b>							
Land and land improvements	321,309	827,539	685,341	181,000	466,925	-	2,482,114
Buildings	3,605,356	11,250,691	7,806,454	10,326,689	7,905,286	(1,728,497)	39,165,979
Furniture and equipment	802,741	61,187	194,390	300,459	195,871	-	1,554,648
Accumulated depreciation	(1,472,457)	(4,895,185)	(2,408,078)	(3,932,914)	(2,646,050)	777,718	(14,576,966)
<b>Net property and equipment</b>	<b>3,256,949</b>	<b>7,244,232</b>	<b>6,278,107</b>	<b>6,875,234</b>	<b>5,922,032</b>	<b>(950,779)</b>	<b>28,625,775</b>
<b>Other long-term assets</b>							
Investments, restricted	87,580	-	-	-	-	-	87,580
Restricted property reserves - operating partnerships	-	66,516	573,762	545,025	404,900	-	1,590,203
Investments in limited partnerships, net	499,813	-	-	-	-	(499,813)	-
Notes and interest receivable, affiliates	2,053,499	-	-	-	-	(2,053,499)	-
Notes and interest receivable	1,375,075	-	-	-	-	-	1,375,075
Other assets, net - operating partnerships	30,603	6,430	16,091	34,971	35,505	-	123,600
<b>Total other long-term assets</b>	<b>4,046,570</b>	<b>72,946</b>	<b>589,853</b>	<b>579,996</b>	<b>440,405</b>	<b>(2,553,312)</b>	<b>3,176,458</b>
<b>Total assets</b>	<b>\$ 11,095,000</b>	<b>\$ 7,392,120</b>	<b>\$ 6,989,205</b>	<b>\$ 7,535,354</b>	<b>\$ 6,449,801</b>	<b>\$ (3,675,369)</b>	<b>\$ 35,786,111</b>

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Financial Position**  
**June 30, 2021**

Liabilities	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLP	Stoddard Johnston Scholar House, LLP	Parkland Scholar House, LLP	Eliminations	Consolidated Family Scholar House, Inc.
<b>Current liabilities</b>							
Accounts payable and accrued expenses - corporate operations	\$ 54,518	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 54,518
Accounts payable and accrued expenses - operating partnerships	-	98,130	156,690	78,287	45,315	-	378,422
Due to affiliates	-	115,500	-	31,095	24,683	(171,278)	-
Current portion of notes payable - corporate operations	30,497	-	-	-	-	-	30,497
Current portion of notes payable - operating partnerships	-	-	17,302	17,628	-	-	34,930
Deferred revenue and other liabilities	35,000	-	228,627	-	-	-	263,627
Tenant security deposits	24,306	11,485	9,650	12,805	8,448	-	66,694
<b>Total current liabilities</b>	<b>144,321</b>	<b>225,115</b>	<b>412,269</b>	<b>139,815</b>	<b>78,446</b>	<b>(171,278)</b>	<b>828,688</b>
<b>Long-term liabilities</b>							
Accrued interest	30,336	-	5,981	68,818	-	-	105,135
Accrued interest, affiliates	-	-	166,132	-	49,579	(215,711)	-
Notes payable, less current portion, net - corporate operations	2,034,750	-	-	-	-	-	2,034,750
Notes payable, less current portion, net - operating partnerships	-	-	925,402	1,865,269	-	-	2,790,671
Notes payable, less current portion, affiliates	-	-	1,734,574	-	103,214	(1,837,788)	-
Deferred revenue and other liabilities	-	1,943	926,062	6,287	3,806	-	938,098
<b>Total long-term liabilities</b>	<b>2,065,086</b>	<b>1,943</b>	<b>3,758,151</b>	<b>1,940,374</b>	<b>156,599</b>	<b>(2,053,499)</b>	<b>5,868,654</b>
<b>Total liabilities</b>	<b>2,209,407</b>	<b>227,058</b>	<b>4,170,420</b>	<b>2,080,189</b>	<b>235,045</b>	<b>(2,224,777)</b>	<b>6,697,342</b>
<b>Net assets without donor restrictions</b>							
Net assets without donor restrictions, controlling - corporate operations	8,454,564	-	-	-	-	(950,779)	7,503,785
Net assets without donor restrictions, controlling - operating partnerships	-	7,165,062	499,705	(1)	109	(499,813)	7,165,062
Net assets without donor restrictions, noncontrolling - operating partnerships	-	-	2,319,080	5,455,166	6,214,647	-	13,988,893
<b>Total net assets without donor restrictions</b>	<b>8,454,564</b>	<b>7,165,062</b>	<b>2,818,785</b>	<b>5,455,165</b>	<b>6,214,756</b>	<b>(1,450,592)</b>	<b>28,657,740</b>
<b>Net assets with donor restrictions</b>							
Net assets with donor restrictions	431,029	-	-	-	-	-	431,029
<b>Total net assets</b>	<b>8,885,593</b>	<b>7,165,062</b>	<b>2,818,785</b>	<b>5,455,165</b>	<b>6,214,756</b>	<b>(1,450,592)</b>	<b>29,088,769</b>
<b>Total liabilities and net assets</b>	<b>\$ 11,095,000</b>	<b>\$ 7,392,120</b>	<b>\$ 6,989,205</b>	<b>\$ 7,535,354</b>	<b>\$ 6,449,801</b>	<b>\$ (3,675,369)</b>	<b>\$ 35,786,111</b>

Net assets without donor restrictions  
Net assets without donor restrictions, controlling - corporate operations  
Net assets without donor restrictions, controlling - operating partnerships  
Net assets without donor restrictions, noncontrolling - operating partnerships

See Independent Auditor's Report.

**Family Scholar House, Inc. and Subsidiaries**  
**Consolidating Statement of Activities**  
**and Changes in Net Assets**  
**Year Ended June 30, 2021**

	Family Scholar House, Inc.	Louisville Scholar House, LLC	Downtown Scholar House, LLP	Stoddard Johnston Scholar House, LLP	Parkland Scholar House, LLP	Eliminations	Consolidated Family Scholar House, Inc.
<b>Revenues</b>							
Rent - net of vacancies	\$ -	\$ 426,330	\$ 371,586	\$ 418,783	\$ 290,199	\$ -	\$ 1,506,898
Service fees	53,145	-	-	-	-	(35,645)	17,500
Philanthropy	1,431,957	-	-	-	-	-	1,431,957
Grants	2,667,603	-	15,336	-	-	-	2,682,939
Interest	100,763	18	271	145	103	(52,320)	48,980
Unrealized gain on investments	12,465	-	-	-	-	-	12,465
Other	263,744	4,520,901	205,696	9,856	3,806	(4,475,570)	528,433
<b>Total revenues</b>	<b>4,529,677</b>	<b>4,947,249</b>	<b>592,889</b>	<b>428,784</b>	<b>294,108</b>	<b>(4,563,535)</b>	<b>6,229,172</b>
<b>Expenses and losses</b>							
Compensation	1,720,386	65,585	58,299	65,232	51,995	-	1,961,497
Administrative	782,951	127,096	67,836	35,424	47,193	(35,645)	1,024,855
Professional services	63,845	15,347	7,744	10,161	12,925	-	110,022
Depreciation and amortization	207,797	393,981	232,919	402,398	319,687	(13)	1,556,769
Facility	44,359	339,555	249,962	289,321	261,382	-	1,184,579
Interest and fees	22,918	39,842	89,872	62,188	2,477	(59,664)	157,633
Project expenses	5,846	-	4,333	-	-	-	10,179
(Gain)/loss on extinguishment of debt	4,475,570	-	-	-	-	(4,475,570)	-
<b>Total expenses and losses</b>	<b>7,323,672</b>	<b>981,406</b>	<b>710,965</b>	<b>864,724</b>	<b>695,659</b>	<b>(4,570,892)</b>	<b>6,005,534</b>
<b>Change in net assets</b>	<b>(2,793,995)</b>	<b>3,965,843</b>	<b>(118,076)</b>	<b>(435,940)</b>	<b>(401,551)</b>	<b>7,357</b>	<b>223,638</b>
Net assets at beginning of year	13,537,845	3,199,219	2,936,861	5,891,105	6,616,307	(3,316,206)	28,865,131
Other transfers	(1,858,257)	-	-	-	-	1,858,257	-
<b>Net assets at end of year</b>	<b>\$ 8,885,593</b>	<b>\$ 7,165,062</b>	<b>\$ 2,818,785</b>	<b>\$ 5,455,165</b>	<b>\$ 6,214,756</b>	<b>\$ (1,450,592)</b>	<b>\$ 29,086,769</b>

See Independent Auditor's Report.



Independent Member of Nexia International

[cohnreznick.com](http://cohnreznick.com)



# Michael G. Adams

## FAMILY SCHOLAR HOUSE, INC

File Amended Annual Report	Change Address or Registered Agent		
File Certificate of Assumed Name (DBA)	File Dissolution	Upload a filing	
File Registered Agent Resignation			
Manage Assumed Name	Printable Forms	Subscribe to changes made to this entity	Certificate of Good Standing

### General Information

<b>Organization Number</b>	0409134
<b>Name</b>	FAMILY SCHOLAR HOUSE, INC
<b>Profit or Non-Profit</b>	N - Non-profit
<b>Company Type</b>	KCO - Kentucky Corporation
<b>Status</b>	A - Active
<b>Standing</b>	G - Good
<b>State</b>	KY
<b>File Date</b>	12/15/1995
<b>Organization Date</b>	12/15/1995
<b>Last Annual Report</b>	3/26/2024
<b>Principal Office</b>	403 REG SMITH CIRCLE LOUISVILLE, KY 40208
<b>Registered Agent</b>	CATHE DYKSTRA 403 REG SMITH CIRCLE LOUISVILLE, KY 40208

Show Current Officers
Show Initial Officers
Show Images
Show Former Names
Show Assumed Names



ORDINANCE NO. \_\_\_\_\_, SERIES 2024

AN ORDINANCE APPROPRIATING ~~\$1,500~~ \$5,000 FROM NEIGHBORHOOD DEVELOPMENT FUNDS IN THE FOLLOWING MANNER: \$1,500 EACH FROM DISTRICTS 2 AND 6; AND \$500 EACH FROM DISTRICTS 8, 12, 21, AND 24; THROUGH THE OFFICE OF MANAGEMENT AND BUDGET, TO FAMILY SCHOLAR HOUSE, INC. FOR THEIR PACK A BACKPACK BASH PROVIDING SCHOOL SUPPLIES FOR FAMILY SCHOLAR HOUSE SCHOLARS (AS AMENDED).

SPONSORED BY: COUNCIL MEMBERS SHANKLIN, BAKER,  
RENO-WEBER, BLACKWELL, RUHE, AND FLOOD

BE IT ORDAINED BY THE LEGISLATIVE COUNCIL OF THE LOUISVILLE/JEFFERSON COUNTY METRO GOVERNMENT ("THE COUNCIL") AS FOLLOWS:

**SECTION I:** The sum of ~~\$1,500~~ \$5,000 is hereby appropriated from Neighborhood Development funds in the following manner: \$1,500 each from Districts 2 and 6; and \$500 each from Districts 8, 12, 21, and 24; through the Office of Management and Budget, to Family Scholar House, Inc. for their Pack a Backpack Bash providing school supplies for Family Scholar House scholars.

**SECTION II:** The Council has determined the funds requested in this Ordinance will be expended for a public purpose.

**SECTION III:** This grant is subject to the Council's Policies and Procedures as adopted and effective at the date of passage of this Ordinance.

**SECTION IV:** This Ordinance shall take effect upon its passage and approval or otherwise becoming law.

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Sonya Harward  
Metro Council Clerk

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Markus Winkler  
President of the Council

\_\_\_\_\_  
Craig Greenberg  
Mayor

\_\_\_\_\_  
Approval Date

**APPROVED AS TO FORM AND LEGALITY:**

Michael J. O'Connell  
Jefferson County Attorney

BY: \_\_\_\_\_

O-147-24 Family Scholar House

**ORDINANCE NO. \_\_\_\_\_, SERIES 2024**

**AN ORDINANCE APPROPRIATING \$1,500 FROM NEIGHBORHOOD DEVELOPMENT FUNDS IN THE FOLLOWING MANNER: \$1,500 FROM DISTRICT 2; THROUGH THE OFFICE OF MANAGEMENT AND BUDGET, TO FAMILY SCHOLAR HOUSE, INC. FOR THEIR PACK A BACKPACK BASH PROVIDING SCHOOL SUPPLIES FOR FAMILY SCHOLAR HOUSE SCHOLARS.**

**SPONSORED BY: COUNCIL MEMBER SHANKLIN**

**BE IT ORDAINED BY THE LEGISLATIVE COUNCIL OF THE LOUISVILLE/JEFFERSON COUNTY METRO GOVERNMENT ("THE COUNCIL") AS FOLLOWS:**

**SECTION I:** The sum of \$1,500 is hereby appropriated from Neighborhood Development funds in the following manner: \$1,500 from District 2; through the Office of Management and Budget, to Family Scholar House, Inc. for their Pack a Backpack Bash providing school supplies for Family Scholar House scholars.

**SECTION II:** The Council has determined the funds requested in this Ordinance will be expended for a public purpose.

**SECTION III:** This grant is subject to the Council's Policies and Procedures as adopted and effective at the date of passage of this Ordinance.

**SECTION IV:** This Ordinance shall take effect upon its passage and approval or otherwise becoming law.

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Sonya Harward  
Metro Council Clerk

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Markus Winkler  
President of the Council

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Craig Greenberg  
Mayor

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Approval Date

**APPROVED AS TO FORM AND LEGALITY:**

Michael J. O'Connell  
Jefferson County Attorney

BY: \_\_\_\_\_

O-147-24 Family Scholar House KDM 6-24-24

ORDINANCE NO. 131, SERIES 2024

AN ORDINANCE APPROPRIATING ~~\$1,500~~ ~~\$5,000~~ \$7,000 FROM NEIGHBORHOOD DEVELOPMENT FUNDS IN THE FOLLOWING MANNER: \$1,500 EACH FROM DISTRICTS 2 AND 6; \$750 FROM DISTRICT 3; AND \$500 EACH FROM DISTRICTS 8, 12, 21, AND 24; AND \$250 EACH FROM DISTRICTS 1, 9, 13, 14, AND 17; THROUGH THE OFFICE OF MANAGEMENT AND BUDGET, TO FAMILY SCHOLAR HOUSE, INC. FOR THEIR PACK A BACKPACK BASH PROVIDING SCHOOL SUPPLIES FOR FAMILY SCHOLAR HOUSE SCHOLARS (AS AMENDED).

SPONSORED BY: COUNCIL MEMBERS SHANKLIN, BAKER, RENO-WEBER, BLACKWELL, RUHE, FLOOD, PARRISH-WRIGHT, HAWKINS, OWEN, SEUM, FOWLER, AND PRESIDENT WINKLER

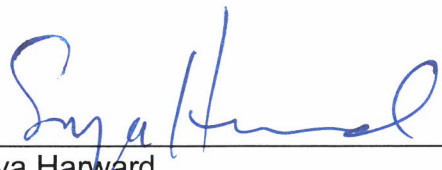
BE IT ORDAINED BY THE LEGISLATIVE COUNCIL OF THE LOUISVILLE/JEFFERSON COUNTY METRO GOVERNMENT ("THE COUNCIL") AS FOLLOWS:

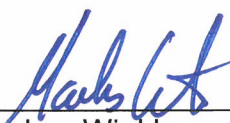
**SECTION I:** The sum of ~~\$1,500~~ ~~\$5,000~~ \$7,000 is hereby appropriated from Neighborhood Development funds in the following manner: \$1,500 each from Districts 2 and 6; \$750 from District 3; and \$500 each from Districts 8, 12, 21, and 24; and \$250 each from Districts 1, 9, 13, 14, and 17; through the Office of Management and Budget, to Family Scholar House, Inc. for their Pack a Backpack Bash providing school supplies for Family Scholar House scholars.

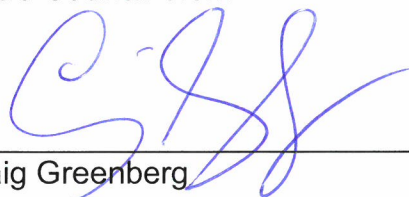
**SECTION II:** The Council has determined the funds requested in this Ordinance will be expended for a public purpose.

**SECTION III:** This grant is subject to the Council's Policies and Procedures as adopted and effective at the date of passage of this Ordinance.

**SECTION IV:** This Ordinance shall take effect upon its passage and approval or otherwise becoming law.

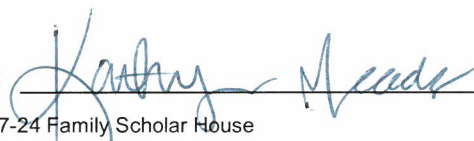
  
Sonya Harward  
Metro Council Clerk

  
Markus Winkler  
President of the Council

  
Craig Greenberg  
Mayor

8-15-2024  
Approval Date

**APPROVED AS TO FORM AND LEGALITY:**  
Michael J. O'Connell  
Jefferson County Attorney

BY:   
O-147-24 Family Scholar House

