

Form **990**Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2024
Open to Public
Inspection
A For the 2024 calendar year, or tax year beginning , and ending

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	C Name of organization UNITED WAY OF MUSKINGUM, PERRY, AND MORGAN COUNTIES, INC. Doing business as _____ Number and street (or P.O. box if mail is not delivered to street address) Room/suite 158 N 5TH ST City or town, state or province, country, and ZIP or foreign postal code ZANESVILLE OH 43701 F Name and address of principal officer: TRACEY BALLAS 158. N FIFTH STREET ZANESVILLE OH 43701	D Employer identification number 31-4379456 E Telephone number 740-454-6872 G Gross receipts \$ 673,255 H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions
I 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		
J Website: WWW.UNITEDWAYOFMPM.ORG H(c) Group exemption number _____		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other L Year of formation: 1954 M State of legal domicile: OH		

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: UNITED WAY AGENCY			
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. 3 Number of voting members of the governing body (Part VI, line 1a) 3 13 4 Number of independent voting members of the governing body (Part VI, line 1b) 4 13 5 Total number of individuals employed in calendar year 2024 (Part V, line 2a) 5 10 6 Total number of volunteers (estimate if necessary) 6 12 7a Total unrelated business revenue from Part VIII, column (C), line 12 7a 0 b Net unrelated business taxable income from Form 990-T, Part I, line 11 7b 0			
Revenue		Prior Year	Current Year	
	8 Contributions and grants (Part VIII, line 1h)	909,229	597,857	
	9 Program service revenue (Part VIII, line 2g)		2,733	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	71,607	72,665	
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	352,958	0	
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,333,794	673,255	
Expenses				
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		463,635	
	14 Benefits paid to or for members (Part IX, column (A), line 4)	314,764	0	
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	263,257	300,935	
	16a Professional fundraising fees (Part IX, column (A), line 11e)		0	
	b Total fundraising expenses (Part IX, column (D), line 25) 102,927			
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	117,726	135,267	
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	695,747	899,837	
	19 Revenue less expenses. Subtract line 18 from line 12	638,047	-226,582	
Net Assets or Fund Balances		Beginning of Current Year	End of Year	
	20 Total assets (Part X, line 16)	5,197,373	5,490,224	
	21 Total liabilities (Part X, line 26)	31,027	36,232	
	22 Net assets or fund balances. Subtract line 21 from line 20	5,166,346	5,453,992	

Part II Signature Block

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

Sign Here	Signature of officer <i>Tracey Ballas</i> TRACEY BALLAS Type or print name and title	Date 12/10/25 CEO
Paid Preparer Use Only	Preparer's name HEATHER DOLEN, CPA Preparer's signature HEATHER DOLEN, CPA Date _____ Check <input type="checkbox"/> if PTIN self-employed P01261466 Firm's name SEO CPA GROUP LTD Firm's EIN 83-1639096 Firm's address 3596 MAPLE AVE STE B ZANESVILLE, OH 43701 Phone no. 740-868-1100	

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

For Paperwork Reduction Act Notice, see the separate instructions.

DAA

Form **990** (2024)

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
Contributions, Gifts, Grants, and Other Similar Amounts	1a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	597,857			
	g Noncash contributions included in lines 1a-1f	1g	\$ 1,865			
	h Total. Add lines 1a-1f		597,857			
	Program Service Revenue	2a GRANT/PROGRAM ADMINISTRATION	Business Code	2,733	2,733	
b						
c						
d						
e						
f All other program service revenue						
g Total. Add lines 2a-2f			2,733			
Other Revenue		3 Investment income (including dividends, interest, and other similar amounts)		72,665		
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6a Gross rents	6a (i) Real (ii) Personal				
	b Less: rental expenses	6b				
	c Rental inc. or (loss)	6c				
	d Net rental income or (loss)					
	7a Gross amount from sales of assets other than inventory	7a (i) Securities (ii) Other				
	b Less: cost or other basis and sales exps.	7b				
	c Gain or (loss)	7c				
	d Net gain or (loss)					
	8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	8a				
	b Less: direct expenses	8b				
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities. See Part IV, line 19	9a				
	b Less: direct expenses	9b				
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances	10a				
b Less: cost of goods sold	10b					
c Net income or (loss) from sales of inventory						
Miscellaneous Revenue	11a	Business Code				
	b					
	c					
	d All other revenue					
	e Total. Add lines 11a-11d					
	12 Total revenue. See instructions		673,255	2,733	0	72,665

Part IX Statement of Functional Expenses

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

Check if Schedule O contains a response or note to any line in this Part IX ☐**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	463,635	463,635		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	82,560	28,896	20,640	33,024
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	154,332	54,016	38,583	61,733
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	8,396		8,396	
9 Other employee benefits	32,042		32,042	
10 Payroll taxes	23,605		23,605	
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	39,185	18,216	20,969	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	8,046		8,046	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	8,989	1,798	4,494	2,697
12 Advertising and promotion	4,030			4,030
13 Office expenses	3,448	477	2,016	955
14 Information technology	10,293		10,293	
15 Royalties				
16 Occupancy	15,000		15,000	
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates	5,678		5,678	
22 Depreciation, depletion, and amortization	4,411		4,411	
23 Insurance	3,918		3,918	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a RECRUITMENT/MOVING	24,380		24,380	
b TELEPHONE	3,179		3,179	
c PERMITS & FEES	2,638		2,638	
d MISCELLANEOUS	2,072	683	901	488
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	899,837	567,721	229,189	102,927
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				