Form **8868**
(Rev. January 2025)
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

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

OMB No. 1545-0047

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

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

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

**Part I - Identification**

**Type or Print**

File by the due date for filing your return. See instructions.

Name of exempt organization, employer, or other filer, see instructions.
NEW AMERICA FOUNDATION

Taxpayer identification number (TIN)
52-2096845

Number, street, and room or suite no. If a P.O. box, see instructions.
740 15TH STREET NW, 900

City, town or post office, state, and ZIP code. For a foreign address, see instructions.
WASHINGTON, DC 20005

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 | Form 990-T (governmental entities) | 15 |

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

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

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

The books are in the care of SUSAN DAILEY
740 15TH STREET, NW, SUITE 900 - WASHINGTON, DC 20005

Telephone No. (202)596-3351 Fax No.

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

**1** I request an automatic 6-month extension of time until NOVEMBER 15, 20 25, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

☒ calendar year 20 24 or
☐ tax year beginning ______, 20 ___, and ending ______, 20 ___

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

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

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

** PUBLIC DISCLOSURE COPY **

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: [ ] Address change [ ] Name change [ ] Initial return [ ] Final return/terminated [ ] Amended return [ ] Application pending

**C** Name of organization: NEW AMERICA FOUNDATION

Doing business as: NEW AMERICA

Number and street (or P.O. box if mail is not delivered to street address): 740 15TH STREET NW — Room/suite: 900

City or town, state or province, country, and ZIP or foreign postal code: WASHINGTON, DC 20005

**D** Employer identification number: 52-2096845

**E** Telephone number: (202) 986-2700

**G** Gross receipts $ 37,233,867.

**F** Name and address of principal officer: BARRY HOWARD, SAME AS C ABOVE

**H(a)** Is this a group return for subordinates? [ ] Yes [X] No

**H(b)** Are all subordinates included? [X] Yes [ ] No — If "No," attach a list. See instructions

**H(c)** Group exemption number

**I** Tax-exempt status: [X] 501(c)(3) [ ] 501(c) ( ) (insert no.) [ ] 4947(a)(1) or [ ] 527

**J** Website: WWW.NEWAMERICA.ORG

**K** Form of organization: [X] Corporation [ ] Trust [ ] Association [ ] Other

**L** Year of formation: 1998

**M** State of legal domicile: DC

## Part I Summary

### Activities & Governance

1 Briefly describe the organization's mission or most significant activities: TO BRING EXCEPTIONALLY PROMISING NEW VOICES & IDEAS TO THE FORE OF OUR NATION'S PUBLIC DISCOURSE.

2 Check this box [ ] if the organization discontinued its operations or disposed of more than 25% of its net assets.

| | | | |
|---|---|---|---|
| 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | 19 |
| 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 17 |
| 5 | Total number of individuals employed in calendar year 2024 (Part V, line 2a) | 5 | 196 |
| 6 | Total number of volunteers (estimate if necessary) | 6 | 17 |
| 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. |

| | | | Prior Year | Current Year |
|---|---|---|---|---|
| Revenue | 8 | Contributions and grants (Part VIII, line 1h) | 44,871,304. | 33,798,453. |
| | 9 | Program service revenue (Part VIII, line 2g) | 691,999. | 1,342,227. |
| | 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 1,071,580. | 1,864,857. |
| | 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 144,162. | 228,330. |
| | 12 | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 46,779,045. | 37,233,867. |
| Expenses | 13 | Grants and similar amounts paid (Part IX, column (A), lines 1-3) | 6,029,168. | 3,036,649. |
| | 14 | Benefits paid to or for members (Part IX, column (A), line 4) | 0. | 0. |
| | 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 22,271,518. | 25,760,697. |
| | 16a | Professional fundraising fees (Part IX, column (A), line 11e) | 58,000. | 126,000. |
| | b | Total fundraising expenses (Part IX, column (D), line 25) 1,754,951. | | |
| | 17 | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | 12,465,336. | 12,416,207. |
| | 18 | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | 40,824,022. | 41,339,553. |
| | 19 | Revenue less expenses. Subtract line 18 from line 12 | 5,955,023. | -4,105,686. |
| | | | **Beginning of Current Year** | **End of Year** |
| Net Assets or Fund Balances | 20 | Total assets (Part X, line 16) | 88,026,169. | 81,423,136. |
| | 21 | Total liabilities (Part X, line 26) | 31,601,449. | 29,109,285. |
| | 22 | Net assets or fund balances. Subtract line 21 from line 20 | 56,424,720. | 52,313,851. |

## 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**

DocuSigned by: 12E4AD9BEC874AE...

Signature of officer — Date: 11/4/2025

BARRY HOWARD, COO

Type or print name and title

**Paid Preparer Use Only**

| Preparer's name | Preparer's signature | Date | Check [ ] if self-employed | PTIN |
|---|---|---|---|---|
| SARAH HINTZ | SARAH HINTZ | 10/31/25 | | P00492291 |

Firm's name: CLIFTONLARSONALLEN LLP — Firm's EIN: 41-0746749

Firm's address: 121 SOUTH TEJON STREET, SUITE 1100, COLORADO SPRINGS, CO 80903 — Phone no. 719-635-0330

May the IRS discuss this return with the preparer shown above? See instructions [X] 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:

NEW AMERICA FOUNDATION IS DEDICATED TO RENEWING AMERICA BY CONTINUING THE QUEST TO REALIZE OUR NATION'S HIGHEST IDEALS, HONESTLY CONFRONTING THE CHALLENGES CAUSED BY RAPID TECHNOLOGICAL AND SOCIAL CHANGE, AND SEIZING THE OPPORTUNITIES THOSE CHANGES CREATE.

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

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

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

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 $ 21,572,514. including grants of $ 1,096,474. ) (Revenue $ 714,360. )

DOMESTIC POLICY PROGRAMS

EDUCATION POLICY PROGRAM: THE EDUCATION POLICY PROGRAM USES ORIGINAL RESEARCH AND POLICY ANALYSIS TO HELP SOLVE THE NATION'S CRITICAL EDUCATION PROBLEMS, CRAFTING OBJECTIVE ANALYSES AND SUGGESTING NEW IDEAS FOR POLICYMAKERS, EDUCATORS, AND THE PUBLIC AT LARGE. NEW AMERICA COMBINES A STEADFAST CONCERN FOR HISTORICALLY DISADVANTAGED POPULATIONS WITH A BELIEF THAT BETTER INFORMATION ABOUT EDUCATION CAN VASTLY IMPROVE BOTH THE POLICIES THAT GOVERN EDUCATIONAL INSTITUTIONS AND THE QUALITY OF LEARNING ITSELF. THE EDUCATION POLICY PROGRAM CONTAINS SEVERAL SUB-PROGRAMS:

THE EARLY & ELEMENTARY EDUCATION POLICY TEAM WORKS TO HELP ENSURE THAT

**4b** (Code: ) (Expenses $ 5,567,084. including grants of $ 558,683. ) (Revenue $ 575,151. )

TECHNOLOGY POLICY PROGRAMS

OPEN TECHNOLOGY INSTITUTE: THE OPEN TECHNOLOGY INSTITUTE STRENGTHENS COMMUNITIES THROUGH GROUNDED RESEARCH, TECHNOLOGICAL INNOVATION, AND POLICY REFORM. NEW AMERICA CREATES REFORM TO SUPPORT OPEN-SOURCE INNOVATIONS AND FOSTER OPEN TECHNOLOGIES AND COMMUNICATIONS NETWORKS. PARTNERING WITH COMMUNITIES, RESEARCHERS, INDUSTRY AND PUBLIC INTEREST GROUPS, NEW AMERICA PROMOTES AFFORDABLE, UNIVERSAL, AND UBIQUITOUS COMMUNICATIONS NETWORKS. IN 2024 THE PROGRAM CONTAINED ONE INITIATIVE:

THE WIRELESS FUTURES PROJECT DEVELOPS AND ADVOCATES POLICY PROPOSALS TO PROMOTE UNIVERSAL, AFFORDABLE, AND UBIQUITOUS BROADBAND AND IMPROVE THE PUBLIC'S ACCESS TO CRITICAL WIRELESS COMMUNICATION TECHNOLOGIES.

**4c** (Code: ) (Expenses $ 2,411,166. including grants of $ 395,884. ) (Revenue $ 0. )

GLOBAL POLICY PROGRAMS

FUTURE SECURITY INITIATIVE: FUTURE SECURITY INITIATIVE IS A COLLABORATION BETWEEN NEW AMERICA AND ARIZONA STATE UNIVERSITY THAT RECONCEPTUALIZES U.S. SECURITY POLICY AS A HOLISTIC ENGAGEMENT WITH CURRENT AND FUTURE CHALLENGES INCLUDING DOMESTIC TERRORISM, ARMED DRONES, CLIMATE CHANGE, PANDEMICS, RISING AUTHORITARIANISM, AND NEW AND EMERGING TECHNOLOGIES. FSI GENERATES TRANSFORMATIVE IDEAS AND SOLUTIONS GROUNDED IN CONCRETE, TRANSDISCIPLINARY EFFORTS TO IMPROVE HUMAN FLOURISHING AND WELL-BEING. FOCUS AREAS INCLUDE TRACKING DRONE STRIKES, TRACKING TERRORISM IN AMERICA POST 9/11, AND EXAMINING THE FUTURE OF PROXY WARFARE.

**4d** Other program services (Describe on Schedule O.)

(Expenses $ 3,158,988. including grants of $ 985,608.) (Revenue $ 79,652.)

**4e** Total program service expenses 32,709,752.



SEE SCHEDULE O FOR CONTINUATION(S)

## Part IV Checklist of Required Schedules

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A* | 1 | X | |
| 2 | Is the organization required to complete *Schedule B, Schedule of Contributors*? See instructions | 2 | X | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I* | 3 | | X |
| 4 | **Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II* | 4 | 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? *If "Yes," complete Schedule C, Part III* | 5 | | X |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I* | 6 | | X |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II* | 7 | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III* | 8 | | 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? *If "Yes," complete Schedule D, Part IV* | 9 | | X |
| 10 | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? *If "Yes," complete Schedule D, Part V* | 10 | | X |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable. | | | |
| a | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI* | 11a | X | |
| b | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII* | 11b | | X |
| c | Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII* | 11c | | X |
| d | Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX* | 11d | X | |
| e | Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X* | 11e | X | |
| f | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X* | 11f | X | |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII* | 12a | X | |
| b | Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional* | 12b | | X |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E* | 13 | | X |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | 14a | 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? *If "Yes," complete Schedule F, Parts I and IV* | 14b | X | |
| 15 | Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV* | 15 | | 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? *If "Yes," complete Schedule F, Parts III and IV* | 16 | X | |
| 17 | Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I.* See instructions | 17 | 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? *If "Yes," complete Schedule G, Part II* | 18 | | X |
| 19 | Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III* | 19 | | X |
| 20a | Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H* | 20a | | X |
| b | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | 20b | | |
| 21 | Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II* | 21 | X | |

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

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

**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 |
|---|---|---|---|---|---|---|
| 1a | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable | 1a | 271 | | | |
| b | Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable | 1b | 0 | | | |
| c | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | | | 1c | 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 | 2a | 196 | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | | 2b | X | |
| 3a | Did the organization have unrelated business gross income of $1,000 or more during the year? | | 3a | | 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* | | 3b | | |
| 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)? | | 4a | | X |
| b | If "Yes," enter the name of the foreign country<br>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? | | 5a | | X |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | 5b | | X |
| c | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | | 5c | | |
| 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? | | 6a | | X |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | 6b | | |
| 7 | **Organizations that may receive deductible contributions under section 170(c).** | | | | |
| a | Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor? | | 7a | | X |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | | 7b | | |
| c | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | 7c | | 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? | | 7e | | X |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | 7f | | X |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | | 7g | | |
| h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | | 7h | | |
| 8 | **Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? | | 8 | | |
| 9 | **Sponsoring organizations maintaining donor advised funds.** | | | | |
| a | Did the sponsoring organization make any taxable distributions under section 4966? | | 9a | | |
| b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | 9b | | |
| 10 | **Section 501(c)(7) organizations.** Enter: | | | | |
| 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 | **Section 501(c)(12) organizations.** 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 | **Section 4947(a)(1) non-exempt charitable trusts.** 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 | **Section 501(c)(29) qualified nonprofit health insurance issuers.** | | | | |
| a | Is the organization licensed to issue qualified health plans in more than one state?<br>**Note:** 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?<br>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?<br>If "Yes," complete Form 4720, Schedule O. | | 16 | | X |
| 17 | **Section 501(c)(21) organizations.** 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?<br>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

| | | | | Yes | No |
|---|---|---|---|---|---|
| 1a | Enter the number of voting members of the governing body at the end of the tax year | 1a 19 | | | |
| | If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. | | | | |
| b | Enter the number of voting members included on line 1a, above, who are independent | 1b 17 | | | |
| 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? | 10a | | 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? | 11a | X | |
| b | Describe on Schedule O the process, if any, used by the organization to review this Form 990. | | | |
| 12a | Did the organization have a written conflict of interest policy? *If "No," go to line 13* | 12a | X | |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | X | |
| c | Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done* | 12c | X | |
| 13 | Did the organization have a written whistleblower policy? | 13 | X | |
| 14 | Did the organization have a written document retention and destruction policy? | 14 | 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 | 15a | X | |
| b | Other officers or key employees of the organization | 15b | X | |
| | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions. | | | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | 16a | | X |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | 16b | | |

## Section C. Disclosure

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

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.

[X] Own website [ ] Another's website [X] Upon request [ ] Other *(explain on Schedule O)*

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, 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

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

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

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

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See 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): Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | (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 |
|---|---|---|---|---|---|---|---|---|---|---|
| (1) ANNE-MARIE SLAUGHTER<br>CEO | 40.00 | X | | X | | | | 570,709. | 0. | 39,151. |
| (2) PAUL BUTLER<br>PRESIDENT & CTO | 40.00 | | | X | | | | 438,951. | 0. | 49,146. |
| (3) BARRY HOWARD<br>COO | 40.00 | | | X | | | | 301,435. | 0. | 65,728. |
| (4) PETER BERGEN<br>VP. GLOBAL STUDIES & FELLOWS | 40.00 | | | | | X | | 293,962. | 0. | 69,095. |
| (5) KEVIN D. CAREY<br>VP. EDU. POLICY & KNOWLEDGE MGMT | 40.00 | | | | X | | | 291,023. | 0. | 33,782. |
| (6) MARLA WILSON<br>VP. DEVELOPMENT & STRATEGIC | 40.00 | | | | | X | | 265,457. | 0. | 38,734. |
| (7) LILIAN CORAL<br>VP. TECH AND DEMOCRACY PROGRAMS | 40.00 | | | | X | | | 230,442. | 0. | 49,576. |
| (8) TARA MCGUINNESS<br>SENIOR DIRECTOR, NEW PRACTICE LAB | 40.00 | | | | X | | | 246,048. | 0. | 25,954. |
| (9) SHAENA L. GLIER<br>SENIOR DIRECTOR OF FINANCE | 40.00 | | | X | | | | 226,596. | 0. | 35,644. |
| (10) ELENA SILVA<br>SR. DIR. EDUCATION POLICY PROGRAM | 40.00 | | | | | X | | 232,309. | 0. | 24,556. |
| (11) THEODORE R. JOHNSON<br>SENIOR ADVISOR | 40.00 | | | | | X | | 228,174. | 0. | 28,253. |
| (12) MARY ALICE MCCARTHY<br>SENIOR DIR., CENTER ON EDU. & LABOR | 40.00 | | | | X | | | 219,492. | 0. | 36,685. |
| (13) PETER SINGER<br>SENIOR FELLOW & STRATEGIST | 40.00 | | | | | X | | 224,976. | 0. | 26,979. |
| (14) CECILIA MUNOZ<br>DIRECTOR | 9.00 | X | | | | | | 65,000. | 0. | 0. |
| (15) LENNY T. MENDONCA<br>DIRECTOR - CHAIR (THRU 5/24) | 1.00 | X | | X | | | | 0. | 0. | 0. |
| (16) SALLY OSBERG<br>DIRECTOR - CHAIR (AS OF 5/24) | 1.00 | X | | X | | | | 0. | 0. | 0. |
| (17) TODD PARK<br>DIRECTOR - VICE CHAIR | 1.00 | X | | 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: Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | (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 |
|---|---|---|---|---|---|---|---|---|---|---|
| (18) MONA MOURSHED<br>DIRECTOR - TREASURER | 1.00 | X | | X | | | | 0. | 0. | 0. |
| (19) JAMES FALLOWS<br>DIRECTOR - SECRETARY | 1.00 | X | | X | | | | 0. | 0. | 0. |
| (20) ROBERT ABERNETHY<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (21) DANIELLE ALLEN<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (22) MICHAEL M. CROW<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (23) HELENE D. GAYLE<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (24) REID HOFFMAN<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (25) ZACHARY KARABELL<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (26) DON KATZ<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| **1b Subtotal** | | | | | | | | 3,834,574. | 0. | 523,283. |
| **c Total from continuation sheets to Part VII, Section A** | | | | | | | | 0. | 0. | 0. |
| **d Total (add lines 1b and 1c)** | | | | | | | | 3,834,574. | 0. | 523,283. |

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 74

| | | Yes | No |
|---|---|---|---|
| 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* | 3 | | 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* | 4 | X | |
| 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person* | 5 | | X |

**Section B. Independent Contractors**

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

| (A) Name and business address | (B) Description of services | (C) Compensation |
|---|---|---|
| EQUAL MEASURE, 520 WALNUT ST STE #1450, PHILADELPHIA, PA 19106 | STRATEGIC PLANNING SERVICES FOR PAYA | 231,860. |
| LITTLE CRANE CONSULTING INC. 724 CRANE BLVD, LOS ANGELES, CA 90065 | CONSULTING SERVICES FOR NEW PRACTICE LAB | 186,687. |
| MARATHON STRATEGIES LLC, 6 GR. CENTRAL AT 666 3RD AVE, STE 1703, NEW YORK, NY 10017 | CONSULTING SERVICES FOR NEW PRACTICE LAB | 180,000. |
| THE PODGLOMERATE LLC 668 MIDDLE ST, APT 1, PORTSMOUTH, NH 03801 | CONSULTING SERVICES - THE PROGRESS NETWO | 164,919. |
| NORC AT THE UNIVERSITY OF CHICAGO 55 EAST MONROE ST, CHICAGO, IL 60603 | RESEARCH AND COMM SERVICES FOR HIGHER ED | 149,000. |

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization 14

SEE PART VII, SECTION A CONTINUATION SHEETS

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

| (A) Name and title | (B) Average hours per week (list any hours for related organizations below line) | (C) Position: Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| (27) PATRICK RADDEN KEEFE<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (28) ASHTON KUTCHER<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (29) MONICA LOZANO<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (30) MOIRA SHOURIE<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| (31) ASHLEY SWEARENGIN<br>DIRECTOR | 1.00 | X | | | | | | 0. | 0. | 0. |
| Total to Part VII, Section A, line 1c | | | | | | | | | | |

**Part VIII** **Statement of Revenue**

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

| | | | | (A) 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 | 1 a | Federated campaigns | 1a | | | | |
| | b | Membership dues | 1b | | | | |
| | c | Fundraising events | 1c | | | | |
| | d | Related organizations | 1d | | | | |
| | e | Government grants (contributions) | 1e 898,779. | | | | |
| | f | All other contributions, gifts, grants, and similar amounts not included above | 1f 32,899,674. | | | | |
| | g | Noncash contributions included in lines 1a-1f | 1g $ 30,940. | | | | |
| | h | **Total.** Add lines 1a-1f | | 33,798,453. | | | |
| Program Service Revenue | | | Business Code | | | | |
| | 2 a | CONTRACTS/FEES FOR SERVICE | 541900 | 1,340,351. | 1,340,351. | | |
| | b | PUBLICATION SALES | 900099 | 1,876. | 1,876. | | |
| | c | | | | | | |
| | d | | | | | | |
| | e | | | | | | |
| | f | All other program service revenue | | | | | |
| | g | **Total.** Add lines 2a-2f | | 1,342,227. | | | |
| Other Revenue | 3 | Investment income (including dividends, interest, and other similar amounts) | | 1,864,857. | | | 1,864,857. |
| | 4 | Income from investment of tax-exempt bond proceeds | | | | | |
| | 5 | Royalties | | | | | |
| | | | (i) Real / (ii) Personal | | | | |
| | 6 a | Gross rents | 6a 201,394. / | | | | |
| | b | Less: rental expenses | 6b 0. / | | | | |
| | c | Rental income or (loss) | 6c 201,394. / | | | | |
| | d | Net rental income or (loss) | | 201,394. | | | 201,394. |
| | | | (i) Securities / (ii) Other | | | | |
| | 7 a | Gross amount from sales of assets other than inventory | 7a | | | | |
| | b | Less: cost or other basis and sales expenses | 7b | | | | |
| | c | Gain or (loss) | 7c | | | | |
| | d | Net gain or (loss) | | | | | |
| | 8 a | Gross income from fundraising events (not including $ ______ of contributions reported on line 1c). See Part IV, line 18 | 8a | | | | |
| | b | Less: direct expenses | 8b | | | | |
| | c | Net income or (loss) from fundraising events | | | | | |
| | 9 a | Gross income from gaming activities. See Part IV, line 19 | 9a | | | | |
| | b | Less: direct expenses | 9b | | | | |
| | c | Net income or (loss) from gaming activities | | | | | |
| | 10 a | Gross sales of inventory, less returns and allowances | 10a | | | | |
| | b | Less: cost of goods sold | 10b | | | | |
| | c | Net income or (loss) from sales of inventory | | | | | |
| Miscellaneous Revenue | | | Business Code | | | | |
| | 11 a | INSURANCE CLAIM PAYMENT | 900099 | 16,764. | 16,764. | | |
| | b | WORKERS' COMPENSATION PREMIUM ADJ | 900099 | 10,029. | 10,029. | | |
| | c | INSURANCE REFUND | 900099 | 143. | 143. | | |
| | d | All other revenue | | | | | |
| | e | **Total.** Add lines 11a-11d | | 26,936. | | | |
| | 12 | **Total revenue.** See instructions | | 37,233,867. | 1,369,163. | 0. | 2,066,251. |

**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 .......... X

| *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 | 1,061,582. | 1,061,582. | | |
| 2 Grants and other assistance to domestic individuals. See Part IV, line 22 | 1,817,867. | 1,817,867. | | |
| 3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 | 157,200. | 157,200. | | |
| 4 Benefits paid to or for members | | | | |
| 5 Compensation of current officers, directors, trustees, and key employees | 2,925,362. | 1,421,781. | 1,060,386. | 443,195. |
| 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 | 17,789,924. | 13,626,337. | 3,446,483. | 717,104. |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | 1,472,352. | 1,078,573. | 330,327. | 63,452. |
| 9 Other employee benefits | 2,061,679. | 1,532,717. | 414,469. | 114,493. |
| 10 Payroll taxes | 1,511,380. | 1,100,090. | 327,383. | 83,907. |
| 11 Fees for services (nonemployees): | | | | |
| a Management | | | | |
| b Legal | 58,315. | 13,250. | 45,065. | |
| c Accounting | 115,707. | | 115,707. | |
| d Lobbying | | | | |
| e Professional fundraising services. See Part IV, line 17 | 126,000. | | | 126,000. |
| f Investment management fees | | | | |
| g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.) | 5,985,710. | 5,138,468. | 755,714. | 91,528. |
| 12 Advertising and promotion | | | | |
| 13 Office expenses | 890,114. | 182,282. | 666,511. | 41,321. |
| 14 Information technology | 32,483. | 6,450. | 26,033. | |
| 15 Royalties | | | | |
| 16 Occupancy | 3,108,562. | 2,706,878. | 387,334. | 14,350. |
| 17 Travel | 1,110,356. | 963,459. | 124,832. | 22,065. |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 Conferences, conventions, and meetings | 247,772. | 219,379. | 27,422. | 971. |
| 20 Interest | 1,410. | | 1,410. | |
| 21 Payments to affiliates | | | | |
| 22 Depreciation, depletion, and amortization | 520,972. | 360,089. | 142,594. | 18,289. |
| 23 Insurance | | | | |
| 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 MISC. EXPENSE | 192,097. | 156,833. | 23,897. | 11,367. |
| b PUBLICATIONS/SUBS | 80,935. | 57,101. | 19,125. | 4,709. |
| c STAFF RECRUITMENT/DEVEL | 71,774. | 25,969. | 43,605. | 2,200. |
| d EXPENSE ALLOCATION | 0. | 1,083,447. | -1,083,447. | |
| e All other expenses | | | | |
| 25 **Total functional expenses.** Add lines 1 through 24e | 41,339,553. | 32,709,752. | 6,874,850. | 1,754,951. |
| 26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720) | | | | |

## Part X Balance Sheet

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

| | | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|---|
| Assets | 1 | Cash - non-interest-bearing | | 16,897,453. | 1 | 13,268,814. |
| | 2 | Savings and temporary cash investments | | 1,396,998. | 2 | 1,737,259. |
| | 3 | Pledges and grants receivable, net | | 22,619,395. | 3 | 20,228,819. |
| | 4 | Accounts receivable, net | | 393,899. | 4 | 360,331. |
| | 5 | Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons | | | 5 | |
| | 6 | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) | | | 6 | |
| | 7 | Notes and loans receivable, net | | | 7 | |
| | 8 | Inventories for sale or use | | | 8 | |
| | 9 | Prepaid expenses and deferred charges | | 626,356. | 9 | 803,829. |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D | 10a 7,731,903. | | | |
| | b | Less: accumulated depreciation | 10b 4,627,282. | 3,435,968. | 10c | 3,104,621. |
| | 11 | Investments - publicly traded securities | | 22,731,276. | 11 | 24,432,074. |
| | 12 | Investments - other securities. See Part IV, line 11 | | | 12 | |
| | 13 | Investments - program-related. See Part IV, line 11 | | | 13 | |
| | 14 | Intangible assets | | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | 19,924,824. | 15 | 17,487,389. |
| | 16 | **Total assets.** Add lines 1 through 15 (must equal line 33) | | 88,026,169. | 16 | 81,423,136. |
| Liabilities | 17 | Accounts payable and accrued expenses | | 2,751,427. | 17 | 3,367,907. |
| | 18 | Grants payable | | | 18 | |
| | 19 | Deferred revenue | | 16,667. | 19 | 11,667. |
| | 20 | Tax-exempt bond liabilities | | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | | 21 | |
| | 22 | Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons | | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | | 24 | |
| | 25 | Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D | | 28,833,355. | 25 | 25,729,711. |
| | 26 | **Total liabilities.** Add lines 17 through 25 | | 31,601,449. | 26 | 29,109,285. |
| Net Assets or Fund Balances | | **Organizations that follow FASB ASC 958, check here [X] and complete lines 27, 28, 32, and 33.** | | | | |
| | 27 | Net assets without donor restrictions | | 12,670,306. | 27 | 15,066,891. |
| | 28 | Net assets with donor restrictions | | 43,754,414. | 28 | 37,246,960. |
| | | **Organizations that do not follow FASB ASC 958, check here [ ] and complete lines 29 through 33.** | | | | |
| | 29 | Capital stock or trust principal, or current funds | | | 29 | |
| | 30 | Paid-in or capital surplus, or land, building, or equipment fund | | | 30 | |
| | 31 | Retained earnings, endowment, accumulated income, or other funds | | | 31 | |
| | 32 | Total net assets or fund balances | | 56,424,720. | 32 | 52,313,851. |
| | 33 | Total liabilities and net assets/fund balances | | 88,026,169. | 33 | 81,423,136. |

## Part XI Reconciliation of Net Assets

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

| | | | |
|---|---|---|---|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 37,233,867. |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 41,339,553. |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | -4,105,686. |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) | 4 | 56,424,720. |
| 5 | Net unrealized gains (losses) on investments | 5 | |
| 6 | Donated services and use of facilities | 6 | |
| 7 | Investment expenses | 7 | |
| 8 | Prior period adjustments | 8 | |
| 9 | Other changes in net assets or fund balances (explain on Schedule O) | 9 | -5,183. |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | 10 | 52,313,851. |

## Part XII Financial Statements and Reporting

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

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

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

Department of the Treasury
Internal Revenue Service

# Public Charity Status and Public Support

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

OMB No. 1545-0047
**2024**
**Open to Public Inspection**

**Name of the organization**
NEW AMERICA FOUNDATION

**Employer identification number**
52-2096845

**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? Yes | No | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| **Total** | | | | | | |

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

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

## Section A. Public Support

| Calendar year (or fiscal year beginning in) | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") | 46,682,652. | 39,659,982. | 39,189,666. | 44,871,304. | 33,798,453. | 204,202,057. |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 4 **Total.** Add lines 1 through 3 | 46,682,652. | 39,659,982. | 39,189,666. | 44,871,304. | 33,798,453. | 204,202,057. |
| 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) | | | | | | 48,082,789. |
| 6 **Public support.** Subtract line 5 from line 4. | | | | | | 156,119,268. |

## Section B. Total Support

| Calendar year (or fiscal year beginning in) | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|---|---|---|---|---|---|
| 7 Amounts from line 4 | 46,682,652. | 39,659,982. | 39,189,666. | 44,871,304. | 33,798,453. | 204,202,057. |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources | 786,969. | 9,447. | 92,675. | 1,216,858. | 2,066,251. | 4,172,200. |
| 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.) | | | | 552. | 26,936. | 27,488. |
| 11 **Total support.** Add lines 7 through 10 | | | | | | 208,401,745. |

12 Gross receipts from related activities, etc. (see instructions) 12 4,751,524.

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

## Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f)) 14 74.91 %

15 Public support percentage from 2023 Schedule A, Part II, line 14 15 76.73 %

16a **33 1/3% support test - 2024.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☒

b **33 1/3% support test - 2023.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

17a **10% -facts-and-circumstances test - 2024.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

b **10% -facts-and-circumstances test - 2023.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐

## 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) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513 | | | | | | |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 6 **Total.** Add lines 1 through 5 | | | | | | |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons | | | | | | |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year | | | | | | |
| c Add lines 7a and 7b | | | | | | |
| 8 **Public support.** (Subtract line 7c from line 6.) | | | | | | |

### Section B. Total Support

| Calendar year (or fiscal year beginning in) | (a) 2020 | (b) 2021 | (c) 2022 | (d) 2023 | (e) 2024 | (f) Total |
|---|---|---|---|---|---|---|
| 9 Amounts from line 6 | | | | | | |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources | | | | | | |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| c Add lines 10a and 10b | | | | | | |
| 11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on | | | | | | |
| 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) | | | | | | |
| 13 **Total support.** (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

| | | | |
|---|---|---|---|
| 15 | Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f)) | 15 | % |
| 16 | Public support percentage from 2023 Schedule A, Part III, line 15 | 16 | % |

### Section D. Computation of Investment Income Percentage

| | | | |
|---|---|---|---|
| 17 | Investment income percentage for **2024** (line 10c, column (f), divided by line 13, column (f)) | 17 | % |
| 18 | Investment income percentage from **2023** Schedule A, Part III, line 17 | 18 | % |

19a **33 1/3% support tests - 2024.** 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 - 2023.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

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

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

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

**Part IV Supporting Organizations** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| **11** | Has the organization accepted a gift or contribution from any of the following persons? | | | |
| **a** | A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization? | **11a** | | |
| **b** | A family member of a person described on line 11a above? | **11b** | | |
| **c** | 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* **Part VI.** | **11c** | | |

## Section B. Type I Supporting Organizations

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

## Section C. Type II Supporting Organizations

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

## Section D. All Type III Supporting Organizations

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

## Section E. Type III Functionally Integrated Supporting Organizations

**1** *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year* **(see instructions).**

- **a** ☐ The organization satisfied the Activities Test. *Complete* **line 2** *below.*
- **b** ☐ The organization is the parent of each of its supported organizations. *Complete* **line 3** *below.*
- **c** ☐ The organization supported a governmental entity. *Describe in* **Part VI** *how you supported a governmental entity (see instructions).*

| | | | Yes | No |
|---|---|---|---|---|
| **2** | Activities Test. **Answer lines 2a and 2b below.** | | | |
| **a** | *Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in* **Part VI identify those supported organizations and explain** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.* | **2a** | | |
| **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* **Part VI** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.* | **2b** | | |
| **3** | Parent of Supported Organizations. **Answer lines 3a and 3b below.** | | | |
| **a** | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in **Part VI**. | **3a** | | |
| **b** | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in **Part VI** the role played by the organization in this regard. | **3b** | | |

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

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

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

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

| **Section C - Distributable Amount** | | | | Current Year |
|---|---|---|---|---|
| 1 | Adjusted net income for prior year (from Section A, line 8, column A) | 1 | | |
| 2 | Enter 0.85 of line 1. | 2 | | |
| 3 | Minimum asset amount for prior year (from Section B, line 8, column A) | 3 | | |
| 4 | Enter greater of line 2 or line 3. | 4 | | |
| 5 | Income tax imposed in prior year | 5 | | |
| 6 | **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions). | 6 | | |

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

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

| **Section D - Distributions** | | **Current Year** |
|---|---|---|
| **1** Amounts paid to supported organizations to accomplish exempt purposes | 1 | |
| **2** Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity | 2 | |
| **3** Administrative expenses paid to accomplish exempt purposes of supported organizations | 3 | |
| **4** Amounts paid to acquire exempt-use assets | 4 | |
| **5** Qualified set-aside amounts (prior IRS approval required - *provide details in* **Part VI**) | 5 | |
| **6** Other distributions (describe in **Part VI**). See instructions. | 6 | |
| **7** **Total annual distributions.** Add lines 1 through 6. | 7 | |
| **8** Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions. | 8 | |
| **9** Distributable amount for 2024 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-2024** | **(iii)** **Distributable Amount for 2024** |
|---|---|---|---|
| **1** Distributable amount for 2024 from Section C, line 6 | | | |
| **2** Underdistributions, if any, for years prior to 2024 (reasonable cause required - *explain in* **Part VI**). See instructions. | | | |
| **3** Excess distributions carryover, if any, to 2024 | | | |
| **a** From 2019 | | | |
| **b** From 2020 | | | |
| **c** From 2021 | | | |
| **d** From 2022 | | | |
| **e** From 2023 | | | |
| **f** **Total** of lines 3a through 3e | | | |
| **g** Applied to under distributions of prior years | | | |
| **h** Applied to 2024 distributable amount | | | |
| **i** Carryover from 2019 not applied (see instructions) | | | |
| **j** Remainder. Subtract lines 3g, 3h, and 3i from line 3f. | | | |
| **4** Distributions for 2024 from Section D, line 7: $ | | | |
| **a** Applied to underdistributions of prior years | | | |
| **b** Applied to 2024 distributable amount | | | |
| **c** Remainder. Subtract lines 4a and 4b from line 4. | | | |
| **5** Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in* **Part VI.** See instructions. | | | |
| **6** Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions. | | | |
| **7** **Excess distributions carryover to 2025.** Add lines 3j and 4c. | | | |
| **8** Breakdown of line 7: | | | |
| **a** Excess from 2020 | | | |
| **b** Excess from 2021 | | | |
| **c** Excess from 2022 | | | |
| **d** Excess from 2023 | | | |
| **e** Excess from 2024 | | | |

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

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

OTHER INCOME

2023 AMOUNT: $ 552.

2024 AMOUNT: $ 26,936.

**Schedule B (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Schedule of Contributors

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

OMB No. 1545-0047

| Name of the organization | Employer identification number |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

**Organization type** (check one):

| **Filers of:** | **Section:** |
|---|---|
| Form 990 or 990-EZ | [X] 501(c)( 3 ) (enter number) organization |
| | [ ] 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation |
| | [ ] 527 political organization |
| Form 990-PF | [ ] 501(c)(3) exempt private foundation |
| | [ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | [ ] 501(c)(3) taxable private foundation |

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

**General Rule**

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

**Special Rules**

[X] For an organization described in section 501(c)(3) filing Form 990 or 990-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 |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

**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 | | $ 9,760,382. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 2 | | $ 2,000,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 3 | | $ 1,666,667. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 4 | | $ 1,409,560. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 5 | | $ 1,350,200. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 6 | | $ 1,343,085. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |

| Name of organization | Employer identification number |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

**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 |
|---|---|---|---|
| 7 | | $ 1,314,700. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 8 | | $ 1,225,900. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 9 | | $ 935,106. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 10 | | $ 730,032. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |

| Name of organization | Employer identification number |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

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

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

| (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 |
|---|---|---|---|
| | | $ | |

| Name of organization | Employer identification number |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

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

Use duplicate copies of Part III if additional space is needed.

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

**SCHEDULE C (Form 990)**

Department of the Treasury Internal Revenue Service

# Political Campaign and Lobbying Activities

**For Organizations Exempt From Income Tax Under Section 501(c) and Section 527**

**Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2024**

**Open to Public Inspection**

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

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

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

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

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

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

| Name of organization | Employer identification number (EIN) |
|---|---|
| NEW AMERICA FOUNDATION | 52-2096845 |

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

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.

2 Political campaign activity expenditures ........ $ 0.

3 Volunteer hours for political campaign activities ........ 0.

## Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 ........ $ 0.

2 Enter the amount of any excise tax incurred by organization managers under section 4955 ........ $ 0.

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ........ ☐ Yes ☐ No

4a Was a correction made? ........ ☐ Yes ☐ No

b If "Yes," describe in Part IV.

## Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ........ $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ........ $

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ........ $

4 Did the filing organization file **Form 1120-POL** for this year? ........ ☐ Yes ☐ No

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

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

**Part II-A** **Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

**A** Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

**B** Check ☐ if the filing organization checked box A and "limited control" provisions apply.

| **Limits on Lobbying Expenditures** **(The term "expenditures" means amounts paid or incurred.)** | **(a)** Filing organization's totals | **(b)** Affiliated group totals |
|---|---|---|
| **1a** Total lobbying expenditures to influence public opinion (grassroots lobbying) | 0. | |
| **b** Total lobbying expenditures to influence a legislative body (direct lobbying) | 97,098. | |
| **c** Total lobbying expenditures (add lines 1a and 1b) | 97,098. | |
| **d** Other exempt purpose expenditures | 39,487,504. | |
| **e** Total exempt purpose expenditures (add lines 1c and 1d) | 39,584,602. | |
| **f** Lobbying nontaxable amount. Enter the amount from the following table in both columns. | 1,000,000. | |

| IF the amount on line 1e, column (a) or (b), is: | THEN the lobbying nontaxable amount is: |
|---|---|
| not over $500,000 | 20% of the amount on line 1e. |
| over $500,000 but not over $1,000,000 | $100,000 plus 15% of the excess over $500,000. |
| over $1,000,000 but not over $1,500,000 | $175,000 plus 10% of the excess over $1,000,000. |
| over $1,500,000 but not over $17,000,000 | $225,000 plus 5% of the excess over $1,500,000. |
| over $17,000,000 | $1,000,000. |

| | (a) | (b) |
|---|---|---|
| **g** Grassroots nontaxable amount (enter 25% of line 1f) | 250,000. | |
| **h** Subtract line 1g from line 1a. If zero or less, enter -0- | 0. | |
| **i** Subtract line 1f from line 1c. If zero or less, enter -0- | 0. | |

**j** If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

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

**Lobbying Expenditures During 4-Year Averaging Period**

| Calendar year (or fiscal year beginning in) | **(a)** 2021 | **(b)** 2022 | **(c)** 2023 | **(d)** 2024 | **(e)** Total |
|---|---|---|---|---|---|
| **2a** Lobbying nontaxable amount | 1,000,000. | 1,000,000. | 1,000,000. | 1,000,000. | 4,000,000. |
| **b** Lobbying ceiling amount (150% of line 2a, column(e)) | | | | | 6,000,000. |
| **c** Total lobbying expenditures | 97,146. | 7,903. | 78,750. | 97,098. | 280,897. |
| **d** Grassroots nontaxable amount | 250,000. | 250,000. | 250,000. | 250,000. | 1,000,000. |
| **e** Grassroots ceiling amount (150% of line 2d, column (e)) | | | | | 1,500,000. |
| **f** Grassroots lobbying expenditures | | | | | |

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

| *For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.* | (a) Yes | (a) No | (b) Amount |
|---|---|---|---|
| **1** During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of: | | | |
| **a** Volunteers? | | | |
| **b** Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? | | | |
| **c** Media advertisements? | | | |
| **d** Mailings to members, legislators, or the public? | | | |
| **e** Publications, or published or broadcast statements? | | | |
| **f** Grants to other organizations for lobbying purposes? | | | |
| **g** Direct contact with legislators, their staffs, government officials, or a legislative body? | | | |
| **h** Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? | | | |
| **i** Other activities? | | | |
| **j** Total. Add lines 1c through 1i | | | |
| **2a** Did the activities in line 1 cause the organization to not be described in section 501(c)(3)? | | | |
| **b** If "Yes," enter the amount of any tax incurred under section 4912 | | | |
| **c** If "Yes," enter the amount of any tax incurred by organization managers under section 4912 | | | |
| **d** If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? | | | |

**Part III-A** **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

| | | | Yes | No |
|---|---|---|---|---|
| **1** | Were substantially all (90% or more) dues received nondeductible by members? | 1 | | |
| **2** | Did the organization make only in-house lobbying expenditures of $2,000 or less? | 2 | | |
| **3** | Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year? | 3 | | |

**Part III-B** **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No;" OR (b) Part III-A, line 3, is answered "Yes."**

| | | | |
|---|---|---|---|
| **1** | Dues, assessments, and similar amounts from members | 1 | |
| **2** | Section 162(e) nondeductible lobbying and political expenditures **(do not include amounts of political expenses for which the section 527(f) tax was paid):** | | |
| **a** | Current year | 2a | |
| **b** | Carryover from last year | 2b | |
| **c** | Total | 2c | |
| **3** | Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues | 3 | |
| **4** | If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year? | 4 | |
| **5** | Taxable amount of lobbying and political expenditures. See instructions | 5 | |

**Part IV** **Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

**SCHEDULE D**
**(Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Supplemental Financial Statements

**Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

**Name of the organization** NEW AMERICA FOUNDATION

**Employer identification number** 52-2096845

## 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? ☐ Yes ☐ 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? ☐ Yes ☐ 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).

☐ Preservation of land for public use (for example, recreation or education)
☐ Protection of natural habitat
☐ Preservation of open space
☐ Preservation of a historically important land area
☐ Preservation of a certified historic structure

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 on line 2a | 2c | |
| d | Number of conservation easements included on line 2c 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 2d 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 $ ________

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

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

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other

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

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

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

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

| | | Amount |
|---|---|---|
| c Beginning balance | 1c | |
| d Additions during the year | 1d | |
| e Distributions during the year | 1e | |
| f Ending balance | 1f | |

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

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

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

| | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|---|---|---|---|---|---|
| 1a Beginning of year balance | | | | | |
| 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:

| | | Yes | No |
|---|---|---|---|
| (i) Unrelated organizations? | 3a(i) | | |
| (ii) Related organizations? | 3a(ii) | | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b | | |

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

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

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

| Description of property | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|---|---|---|---|
| 1a Land | | | | |
| b Buildings | | | | |
| c Leasehold improvements | | 6,899,472. | 4,005,821. | 2,893,651. |
| d Equipment | | 741,431. | 621,461. | 119,970. |
| e Other | | 91,000. | | 91,000. |
| **Total.** Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, line 10c, column (B))* | | | | 3,104,621. |

## Part VII Investments - Other Securities

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

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

## Part VIII Investments - Program Related.

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

| (a) Description of investment | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|---|---|
| (1) | | |
| (2) | | |
| (3) | | |
| (4) | | |
| (5) | | |
| (6) | | |
| (7) | | |
| (8) | | |
| (9) | | |
| Total. (Col. (b) must equal Form 990, Part X, line 13, col. (B)) | | |

## Part IX Other Assets

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

| (a) Description | (b) Book value |
|---|---|
| (1) ROU ASSETS | 17,487,389. |
| (2) | |
| (3) | |
| (4) | |
| (5) | |
| (6) | |
| (7) | |
| (8) | |
| (9) | |
| Total. *(Column (b) must equal Form 990, Part X, line 15, col. (B))* | 17,487,389. |

## 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) ROU LIABILITIES | 25,054,269. |
| (3) 457B FUND LIABILITY | 675,442. |
| (4) | |
| (5) | |
| (6) | |
| (7) | |
| (8) | |
| (9) | |
| Total. *(Column (b) must equal Form 990, Part X, line 25, col. (B))* | 25,729,711. |

**2.** Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... [X]

## 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 | 37,241,844. |
| 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 | 13,160. | | |
| c | Recoveries of prior year grants | 2c | | | |
| d | Other (Describe in Part XIII.) | 2d | -5,183. | | |
| e | Add lines 2a through 2d | | | 2e | 7,977. |
| 3 | Subtract line 2e from line 1 | | | 3 | 37,233,867. |
| 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 | 0. |
| 5 | Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)* | | | 5 | 37,233,867. |

## 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 | 41,352,713. |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | | | | |
| a | Donated services and use of facilities | 2a | 13,160. | | |
| b | Prior year adjustments | 2b | | | |
| c | Other losses | 2c | | | |
| d | Other (Describe in Part XIII.) | 2d | | | |
| e | Add lines 2a through 2d | | | 2e | 13,160. |
| 3 | Subtract line 2e from line 1 | | | 3 | 41,339,553. |
| 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 | 0. |
| 5 | Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)* | | | 5 | 41,339,553. |

## 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:

NEW AMERICA IS A 501(C)(3) ORGANIZATION, EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(A) OF THE INTERNAL REVENUE CODE. NEW AMERICA IS, HOWEVER, SUBJECT TO TAX ON BUSINESS INCOME UNRELATED TO ITS EXEMPT PURPOSE.

NEW AMERICA BELIEVES THAT IT HAS APPROPRIATE SUPPORT FOR ANY TAX POSITIONS TAKEN, AND AS SUCH, DOES NOT HAVE ANY UNCERTAIN TAX POSITIONS THAT ARE MATERIAL TO THE FINANCIAL STATEMENTS OR THAT WOULD HAVE AN EFFECT ON ITS TAX-EXEMPT STATUS. THERE ARE NO UNRECOGNIZED TAX BENEFITS OR LIABILITIES THAT NEED TO BE RECORDED.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

LOSS ON FOREIGN CURRENCY EXCHANGE -5,183.

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

**SCHEDULE F (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Statement of Activities Outside the United States

**Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.**
**Attach to Form 990.**
**Go to** *www.irs.gov/Form990* **for instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION

**Employer identification number:** 52-2096845

## Part I General Information on Activities Outside the United States.

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

1 **For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ...... [X] **Yes** [ ] **No**

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

3 Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

| **(a)** Region | **(b)** Number of offices in the region | **(c)** Number of employees, agents, and independent contractors in the region | **(d)** Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region) | **(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region | **(f)** Total expenditures for and investments in the region |
|---|---|---|---|---|---|
| EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA, AUSTRIA, BELGIUM | 0 | 0 | CONTRIBUTIONS RECEIVED | | 0. |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0 | 9 | FELLOWSHIPS | | 134,700. |
| MIDDLE EAST AND NORTH AFRICA | 0 | 1 | FELLOWSHIPS | | 2,500. |
| SOUTH AMERICA | 0 | 1 | FELLOWSHIPS | | 2,500. |
| SUB-SAHARAN AFRICA | 0 | 3 | FELLOWSHIPS | | 7,500. |
| EAST ASIA AND THE PACIFIC | 0 | 1 | FELLOWSHIPS | | 10,000. |
| NORTH AMERICA | 0 | 2 | PROGRAM SERVICES | FUTURE TENSE ARTICLES | 2,057. |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0 | 1 | PROGRAM SERVICES | FUTURE TENSE ARTICLES | 500. |
| **3 a** Subtotal ........ | 0 | 18 | | | 159,757. |
| **b** Total from continuation sheets to Part I ........ | 0 | 30 | | | 562,585. |
| **c Totals** (add lines 3a and 3b) ........ | 0 | 48 | | | 722,342. |

**Part I** **Continuation of Activities per Region.** (Schedule F (Form 990), Part I, line 3)

| (a) Region | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|---|---|---|---|---|---|
| SOUTH ASIA | 0 | 1 | PROGRAM SERVICES | FUTURE TENSE ARTICLES | 525. |
| NORTH AMERICA | 0 | 3 | PROGRAM SERVICES | PROGRAM MANAGEMENT RESEARCH AND SUPPORT | 404,650. |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0 | 22 | PROGRAM SERVICES | PROJECT MANAGEMENT RESEARCH AND SUPPORT | 152,300. |
| SOUTH AMERICA | 0 | 1 | PROGRAM SERVICES | PROJECT MANAGEMENT RESEARCH AND SUPPORT | 1,290. |
| SOUTH ASIA | 0 | 1 | PROGRAM SERVICES | PROJECT MANAGEMENT RESEARCH AND SUPPORT | 1,000. |
| SUB-SAHARAN AFRICA | 0 | 2 | PROGRAM SERVICES | PROJECT MANAGEMENT RESEARCH AND SUPPORT | 2,820. |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| **Totals** ▶ | | 30 | | | 562,585. |

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of noncash assistance | (h) Description of noncash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ........................

3 Enter total number of other organizations or entities ........................

**Part III** **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16.
Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Region | (c) Number of recipients | (d) Amount of cash grant | (e) Manner of cash disbursement | (f) Amount of noncash assistance | (g) Description of noncash assistance | (h) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|
| FELLOWSHIPS | EUROPE (INCLUDING ICELAND & GREENLAND) | 9 | 134,700. | WIRE TRANSFER | 0. | N/A | N/A |
| FELLOWSHIP | MIDDLE EAST AND NORTH AFRICA | 1 | 2,500. | WIRE TRANSFER | 0. | N/A | N/A |
| FELLOWSHIP | SOUTH AMERICA | 1 | 2,500. | WIRE TRANSFER | 0. | N/A | N/A |
| FELLOWSHIPS | SUB-SAHARAN AFRICA | 3 | 7,500. | WIRE TRANSFER | 0. | N/A | N/A |
| FELLOWSHIP | EAST ASIA AND THE PACIFIC | 1 | 10,000. | WIRE TRANSFER | 0. | N/A | N/A |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

## Part IV Foreign Forms

**1** Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see the Instructions for Form 926)* ☐ **Yes** ☒ **No**

**2** Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see the Instructions for Forms 3520 and 3520-A; don't file with Form 990)* ☐ **Yes** ☒ **No**

**3** Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see the Instructions for Form 5471)* ☐ **Yes** ☒ **No**

**4** Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see the Instructions for Form 8621)* ☐ **Yes** ☒ **No**

**5** Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see the Instructions for Form 8865)* ☐ **Yes** ☒ **No**

**6** Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see the Instructions for Form 5713; don't file with Form 990)* ☐ **Yes** ☒ **No**

**Part V** **Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

PART I, LINE 2:

NEW AMERICA REQUIRES REGULAR REPORTING TO SUBSTANTIATE THE WORK SUPPORTED BY THE GRANT.

PART I, LINE 3:

ACCOUNTING METHOD: ACCRUAL BASIS

**SCHEDULE G (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Supplemental Information Regarding Fundraising or Gaming Activities

**Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.**
**Attach to Form 990 or Form 990-EZ.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047
**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION
**Employer identification number**: 52-2096845

## Part I 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.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a [ ] Mail solicitations
- b [X] Internet and email solicitations
- c [X] Phone solicitations
- d [X] In-person solicitations
- e [X] Solicitation of nongovernment grants
- f [X] Solicitation of government grants
- g [X] Special fundraising events

2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? [X] Yes [ ] No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? Yes | No | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
|---|---|---|---|---|---|---|
| EAST 5TH STRATEGIES LLC - 770 FROG ALLEY ROAD, | SEE PART IV | | X | 0. | 126,000. | 0. |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| **Total** | | | | | 126,000. | |

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.

AK,AR,AZ,CA,CO,CT,DC,FL,GA,HI,IL,KS,KY,LA,MA,MD,ME,MI,MN,MS,NC,ND,NH,NJ,NM
NV,NY,OH,OK,OR,PA,RI,SC,TN,UT,VA,WA,WI,WV,WY


SEE PART IV FOR CONTINUATIONS

**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 | (b) Event #2 | (c) Other events | (d) Total events (add col. (a) through col. (c)) |
|---|---|---|---|---|---|
| | | (event type) | (event type) | (total number) | |
| Revenue | 1 Gross receipts | | | | |
| | 2 Less: Contributions | | | | |
| | 3 Gross income (line 1 minus line 2) | | | | |
| Direct Expenses | 4 Cash prizes | | | | |
| | 5 Noncash prizes | | | | |
| | 6 Rent/facility costs | | | | |
| | 7 Food and beverages | | | | |
| | 8 Entertainment | | | | |
| | 9 Other direct expenses | | | | |
| | 10 Direct expense summary. Add lines 4 through 9 in column (d) | | | | |
| | 11 Net income summary. Subtract line 10 from line 3, column (d) | | | | |

**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)) |
|---|---|---|---|---|---|
| Revenue | 1 Gross revenue | | | | |
| Direct Expenses | 2 Cash prizes | | | | |
| | 3 Noncash prizes | | | | |
| | 4 Rent/facility costs | | | | |
| | 5 Other direct expenses | | | | |
| | 6 Volunteer labor | ☐ Yes________ % ☐ No | ☐ Yes________ % ☐ No | ☐ Yes________ % ☐ 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:

a The organization's facility 13a %

b An outside facility 13b %

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

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 the 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.

SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS:

(I) NAME OF FUNDRAISER: EAST 5TH STRATEGIES LLC
(I) ADDRESS OF FUNDRAISER: 770 FROG ALLEY ROAD, MARGARETVILLE, NY 12455

SCHEDULE G PART I, COLUMN (II)
CONSULTING SERVICES TO ASSIST IN DEVELOPING AND EXECUTING STRATEGIES
FOR FUNDRAISING AND GENERATING NEW DONORS.

**Part IV** **Supplemental Information** *(continued)*

**SCHEDULE I (Form 990)** (Rev. December 2024)
Department of the Treasury Internal Revenue Service

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

**Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047
**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION
**Employer identification number**: 52-2096845

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? [X] Yes [ ] No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000. Part II can be duplicated if additional space is needed.

| 1 (a) Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| CAREERWISE COLORADO<br>400 S. COLORADO BLVD, SUITE 700<br>DENVER, CO 80246 | 81-1415662 | 501(C)(3) | 55,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) NATIONAL PARTNER |
| HORIZON EDUCATION ALLIANCE<br>124 E WASHINGTON STREET<br>GOSHEN, IN 46528 | 46-0803293 | 501(C)(3) | 100,000. | 0. | N/A | N/A | SUPPORT GRANTEET'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) |
| UNIVERSITY OF MINNESOTA FOUNDATION<br>200 OAK STREET SE, SUITE 500<br>MINNEAPOLIS, MN 55455 | 41-6042488 | 501(C)(3) | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) |
| FOUNDATION FOR CALIFORNIA COMMUNITY COLLEGES - 1102 Q STREET, SUITE 4800 - SACRAMENTO, CA 95811 | 68-0412350 | 501(C)(3) | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEET'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) |
| NGA CENTER FOR BEST PRACTICES<br>444 NORTH CAPITOL STREET, SUITE 267<br>WASHINGTON, DC 20001 | 23-7391796 | 501(C)(3) | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) NATIONAL PARTNER |
| EMPLOYINDY<br>101 W. WASHINGTON STREET, STE 1200<br>INDIANAPOLIS, IN 46204 | 35-1569069 | 501(C)(3) | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) |

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table .......... 19.

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

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** **Schedule I (Form 990) (Rev. 12-2024)**

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

LHA 432101 01-02-25

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

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| NEW VENTURE FUND 1201 CONNECTICUT AVE, NW, STE 300 WASHINGTON, DC 20036 | 20-5806345 | 501(C)(3) | 105,845. | 0. | N/A | N/A | TRANSFER OF PIT UN FUNDS |
| NC BUSINESS COMMITTEE FOR EDUCATION, INC - 20301 MAIL SERVICE CENTER - RALEIGH, NC 27699 | 56-1513432 | 501(C)(3) | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| CHATTANOOGA CHAMBER FOUNDATION 811 BROAD STREET, SUITE 100 CHATTANOOGA, TN 37402 | 23-7032834 | 501(C)(3) | 17,500. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) NATIONAL PARTNER |
| COMMUNITY ORGANIZING AND FAMILY ISSUES - 2245 S MICHIGAN AVE, STE 200 - CHICAGO, IL 60616 | 36-4044632 | 501(C)(3) | 50,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE ON THE ILLINOIS EIC AUTOFILLING UX SPRINT WITH NA LOCAL CHICAGO |
| CENTRAL INDIANA CORPORATE PARTNERSHIP INC - TECHPOINT, 111 MONUMENT CIRCLE, STE 1800 - INDIANAPOLIS, IN 46204 | 35-2065459 | 501(C)(6) | 175,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| ALEXANDRIA LIBRARY 5005 DUKE STREET ALEXANDRIA, VA 22304 | 54-6000010 | CITY OF ALEXANDR | 103,237. | 0. | N/A | N/A | SUPPORT GRANTEE'S ROLE IN THE NATIONAL ARCHIVES 1937 SIT-IN DIGITIZATION PROJECT FOR TEACHING, |
| ALABAMA INDUSTRIAL DEVEL. TRAINING INST. - ONE TECHNOLOGY COURT - MONTGOMERY, AL 36116 | 63-0715142 | STATE OF ALABAMA | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| COLORADO DEPARTMENT OF LABOR AND EMPLOYMENT - 633 17TH STREET - DENVER, CO 80202 | 84-0644739 | STATE OF COLORAD | 35,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| INDIANA DEPARTMENT OF EDUCATION 100 N. SENATE AVE., INDIANA GOV. CTR. N. 9TH FLOOR - INDIANAPOLIS, IN 46204 | 35-6000158 | STATE OF INDIANA | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |

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

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| STATE OF KANSAS - KANSAS DEPARTMENT OF COMMERCE - 1000 SW JACKSON STREET, SUITE 100 - TOPEKA, KS 66612 | 48-1124839 | STATE OF KANSAS | 25,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| QUINSIGAMOND COMMUNITY COLLEGE 670 WEST BOYLSTON STREET WORCESTER, MA 01606 | 04-2492727 | STATE OF MASSACH | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT |
| CHARLES STEWART MOTT COMMUNITY COLLEGE - 1401 E. COURT ST - FLINT, MI 48503 | 38-1914697 | STATE OF MICHIGA | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT |
| FORSYTH TECHNICAL COMMUNITY COLLEGE - 2100 SILAS CREEK PARKWAY - WINSTON-SALEM, NC 27103 | 56-0792614 | STATE OF N. CARO | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT |
| LINN-BENTON COMMUNITY COLLEGE 6500 PACIFIC AVE SW ALBANY, OR 97321 | 93-0561307 | STATE OF OREGON | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT |
| UNIVERSITY OF UTAH 201 S PRESIDENTS CIRCLE, RM 411 SALT LAKE CITY, UT 84112 | 87-6000525 | STATE OF UTAH | 35,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN A ONE YEAR TECHNICAL ASSISTANCE ACADEMY |
| MADISON AREA TECHNICAL COLLEGE DISTRICT - 1701 WRIGHT ST - MADISON, WI 53704 | 39-1086718 | STATE OF WISCONS | 30,000. | 0. | N/A | N/A | SUPPORT GRANTEE'S PARTICIPATION IN NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT |
| | | | | | | | |
| | | | | | | | |

**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 |
|---|---|---|---|---|---|
| FELLOWSHIPS | 88 | 1,817,867. | 0. | N/A | N/A |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

**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:
NEW AMERICA REQUIRES REGULAR REPORTING TO SUBSTANTIATE THE WORK SUPPORTED BY THE GRANT.

PART II, LINE 1, COLUMN (H):
NAME OF ORGANIZATION OR GOVERNMENT: HORIZON EDUCATION ALLIANCE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEET'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) FIELD-BASED LEARNING PARTNER.

NAME OF ORGANIZATION OR GOVERNMENT: UNIVERSITY OF MINNESOTA FOUNDATION
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S ROLE AS A PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) FIELD-BASED LEARNING PARTNER.

NAME OF ORGANIZATION OR GOVERNMENT:
FOUNDATION FOR CALIFORNIA COMMUNITY COLLEGES
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEET'S ROLE AS A

**Part IV Supplemental Information**

PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA)
FIELD-BASED LEARNING PARTNER.

NAME OF ORGANIZATION OR GOVERNMENT: EMPLOYINDY
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S ROLE AS A
PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA)
FIELD-BASED LEARNING PARTNER.

NAME OF ORGANIZATION OR GOVERNMENT: MONTGOMERY COLLEGE FOUNDATION, INC.
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: ALEXANDRIA LIBRARY
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S ROLE IN THE
NATIONAL ARCHIVES 1937 SIT-IN DIGITIZATION PROJECT FOR TEACHING,
LEARNING, & TECH

NAME OF ORGANIZATION OR GOVERNMENT: GLEN OAKS COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: SAVANNAH TECHNICAL COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: MCLENNAN COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: QUINSIGAMOND COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT:
CHARLES STEWART MOTT COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: FORSYTH TECHNICAL COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT: LINN-BENTON COMMUNITY COLLEGE
(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

NAME OF ORGANIZATION OR GOVERNMENT:
MADISON AREA TECHNICAL COLLEGE DISTRICT

## Part IV Supplemental Information

(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT GRANTEE'S PARTICIPATION IN
NEW AMERICA'S CHILD CARE FOR STUDENT PARENT'S AT COMMUNITY COLLEGES
PROJECT

PART III, COLUMN (B):
N/A

**SCHEDULE J (Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

# Compensation Information

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

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION

**Employer identification number:** 52-2096845

## Part I Questions Regarding Compensation

| | | | Yes | No |
|---|---|---|---|---|
| 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.<br>☐ First-class or charter travel ☐ Housing allowance or residence for personal use<br>☐ Travel for companions ☐ Payments for business use of personal residence<br>☐ Tax indemnification and gross-up payments ☐ Health or social club dues or initiation fees<br>☐ Discretionary spending account ☐ Personal services (such as maid, chauffeur, chef) | | | |
| b | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain | 1b | | |
| 2 | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? | 2 | | |
| 3 | Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.<br>☒ Compensation committee ☐ Written employment contract<br>☐ Independent compensation consultant ☐ Compensation survey or study<br>☒ Form 990 of other organizations ☒ 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? | 4a | | X |
| b | Participate in or receive payment from a supplemental nonqualified retirement plan? | 4b | | X |
| c | Participate in or receive payment from an equity-based compensation arrangement? | 4c | | X |
| | 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? | 5a | | X |
| b | Any related organization? | 5b | | X |
| | 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? | 6a | | X |
| b | Any related organization? | 6b | | X |
| | 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 | 7 | X | |
| 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 | 8 | | X |
| 9 | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? | 9 | | |

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

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

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

| (A) Name and Title | | (B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation | | | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|---|---|---|---|---|---|---|---|---|
| | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | | | | |
| (1) ANNE-MARIE SLAUGHTER | (i) | 511,787. | 32,112. | 26,810. | 34,500. | 4,651. | 609,860. | 0. |
| CEO | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (2) PAUL BUTLER | (i) | 401,944. | 12,717. | 24,290. | 34,500. | 14,646. | 488,097. | 0. |
| PRESIDENT & CTO | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (3) BARRY HOWARD | (i) | 300,745. | 0. | 690. | 31,246. | 34,482. | 367,163. | 0. |
| COO | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (4) PETER BERGEN | (i) | 283,085. | 8,896. | 1,981. | 30,366. | 38,729. | 363,057. | 0. |
| VP. GLOBAL STUDIES & FELLOWS | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (5) KEVIN D. CAREY | (i) | 290,333. | 0. | 690. | 29,338. | 4,444. | 324,805. | 0. |
| VP. EDU. POLICY & KNOWLEDGE MGMT | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (6) MARLA WILSON | (i) | 264,767. | 0. | 690. | 24,088. | 14,646. | 304,191. | 0. |
| VP. DEVELOPMENT & STRATEGIC | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (7) LILIAN CORAL | (i) | 230,142. | 0. | 300. | 24,221. | 25,355. | 280,018. | 0. |
| VP. TECH AND DEMOCRACY PROGRAMS | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (8) TARA MCGUINNESS | (i) | 245,598. | 0. | 450. | 24,560. | 1,394. | 272,002. | 0. |
| SENIOR DIRECTOR, NEW PRACTICE LAB | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (9) SHAENA L. GLIER | (i) | 219,747. | 6,579. | 270. | 22,790. | 12,854. | 262,240. | 0. |
| SENIOR DIRECTOR OF FINANCE | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (10) ELENA SILVA | (i) | 231,619. | 0. | 690. | 23,162. | 1,394. | 256,865. | 0. |
| SR. DIR. EDUCATION POLICY PROGRAM | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (11) THEODORE R. JOHNSON | (i) | 227,724. | 0. | 450. | 23,048. | 5,205. | 256,427. | 0. |
| SENIOR ADVISOR | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (12) MARY ALICE MCCARTHY | (i) | 217,512. | 0. | 1,980. | 22,039. | 14,646. | 256,177. | 0. |
| SENIOR DIR., CENTER ON EDU. & LABOR | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (13) PETER SINGER | (i) | 224,286. | 0. | 690. | 22,474. | 4,505. | 251,955. | 0. |
| SENIOR FELLOW & STRATEGIST | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 7:

ANY BONUS GIVEN TO AN EXECUTIVE IN 2024 WAS IN RECOGNITION OF EXEMPLARY SERVICE TO THE ORGANIZATION. ANY BONUS PAYMENTS TO THE PRESIDENT AND CHIEF EXECUTIVE OFFICER (CEO) ARE DETERMINED AND APPROVED BY THE COMPENSATION COMMITTEE OF THE BOARD OF DIRECTORS. BONUS PAYMENTS PAID TO EXECUTIVES ARE DETERMINED AND APPROVED BY THE PRESIDENT AND CEO. ALL BONUS PAYMENTS ARE BASED ON PERFORMANCE EVALUATIONS AND NOT GROSS OR NET REVENUE. IT IS UP TO THE DISCRETION OF THE MANAGER TO DETERMINE BONUSES BASED OFF OF SALARY TIERS, WHICH CAN BE GIVEN AT ANY TIME OF THE YEAR.

**SCHEDULE M (Form 990)**

Department of the Treasury
Internal Revenue Service

# Noncash Contributions

**Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2024**

**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION

**Employer identification number** 52-2096845

## Part I Types of Property

| | | (a) Check if applicable | (b) Number of contributions or items contributed | (c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d) Method of determining noncash contribution amounts |
|---|---|---|---|---|---|
| 1 | Art - Works of art | | | | |
| 2 | Art - Historical treasures | | | | |
| 3 | Art - Fractional interests | | | | |
| 4 | Books and publications | | | | |
| 5 | Clothing and household goods | | | | |
| 6 | Cars and other vehicles | | | | |
| 7 | Boats and planes | | | | |
| 8 | Intellectual property | | | | |
| 9 | Securities - Publicly traded | | | | |
| 10 | Securities - Closely held stock | | | | |
| 11 | Securities - Partnership, LLC, or trust interests | | | | |
| 12 | Securities - Miscellaneous | | | | |
| 13 | Qualified conservation contribution - Historic structures | | | | |
| 14 | Qualified conservation contribution - Other | | | | |
| 15 | Real estate - Residential | | | | |
| 16 | Real estate - Commercial | | | | |
| 17 | Real estate - Other | | | | |
| 18 | Collectibles | | | | |
| 19 | Food inventory | | | | |
| 20 | Drugs and medical supplies | | | | |
| 21 | Taxidermy | | | | |
| 22 | Historical artifacts | | | | |
| 23 | Scientific specimens | | | | |
| 24 | Archeological artifacts | | | | |
| 25 | Other ( MATERIALS ) | X | 24 | 30,940. | FAIR MARKET VALUE |
| 26 | Other ( ) | | | | |
| 27 | Other ( ) | | | | |
| 28 | Other ( ) | | | | |

| | | | |
|---|---|---|---|
| 29 | Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement | 29 | 0 |

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

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** **Schedule M (Form 990) 2024**

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

SCHEDULE M, PART I, COLUMN (B):

COLUMN B REPRESENTS THE NUMBER OF ITEMS DONATED.

**SCHEDULE O (Form 990)** (Rev. December 2024) Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990 or 990-EZ

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

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization: NEW AMERICA FOUNDATION

**Employer identification number** 52-2096845

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:
ALL CHILDREN HAVE ACCESS TO A SYSTEM OF HIGH-QUALITY EARLY LEARNING OPPORTUNITIES FROM BIRTH THROUGH THIRD GRADE THAT PREPARE THEM TO SUCCEED IN SCHOOL AND IN LIFE.

THE PREK-12 INITIATIVE WORKS TO ENSURE THAT ALL CHILDREN ATTENDING PUBLIC ELEMENTARY AND SECONDARY SCHOOLS HAVE ACCESS TO AND RECEIVE HIGH-QUALITY EDUCATIONAL EXPERIENCES, WITH A PARTICULAR EMPHASIS ON IMPROVING EQUITY AND OUTCOMES FOR TRADITIONALLY UNDERSERVED STUDENTS.
IT ALSO CONTAINS THE SUB-INITIATIVES:
(1) THE ENGLISH LEARNERS INITIATIVE PROVIDES A POLICY-DRIVEN FOCUS ON LANGUAGE LEARNERS IN THE EARLY CHILDHOOD YEARS THROUGH THE PREK-12 EDUCATION SYSTEM. THE INITIATIVE CONDUCT RESEARCH, DEVELOP RECOMMENDATIONS, AND DISSEMINATE NEW IDEAS TO POLICYMAKERS, PRACTITIONERS, AND THE PUBLIC TO IMPROVE OUTCOMES FOR ENGLISH LEARNERS.
(2) THE EDUCATION FUNDING EQUITY INITIATIVE CONDUCTS QUANTITATIVE, QUALITATIVE, AND GEOSPATIAL ANALYSIS TO UNDERSTAND AND HIGHLIGHT THE IMPACT OF CURRENT SCHOOL FUNDING POLICIES AND POINT THE WAY TOWARD MORE EQUITABLE APPROACHES.

THE HIGHER EDUCATION INITIATIVE WORKS TO MAKE HIGHER EDUCATION MORE ACCESSIBLE, INNOVATIVE, STUDENT-CENTERED, OUTCOMES-FOCUSED, AND EQUITABLE.

THE TEACHING, LEARNING, AND TECH PROJECT FOCUSES ON HOW EDUCATORS AND OTHER PROFESSIONALS CAN USE NEW MEDIA AND TECHNOLOGIES TO PROMOTE MORE EQUITABLE SYSTEMS OF LEARNING, FROM PRE-K THROUGH 12TH GRADE AND INTO THE POST-SECONDARY YEARS.

THE CENTER ON EDUCATION AND LABOR IS DEDICATED TO RESTORING THE LINK BETWEEN EDUCATION AND ECONOMIC MOBILITY. THE CENTER'S WORK SPANS THE POLICY DOMAINS OF EDUCATION, LABOR, AND WORKFORCE DEVELOPMENT. THE GOAL IS TO FORGE A MORE HOLISTIC APPROACH TO THE CHALLENGES GENERATED FROM TECHNOLOGICAL CHANGE, AN APPROACH THAT RECOGNIZES THE NEED TO EQUIP WORKERS OF THE FUTURE WITH THE KNOWLEDGE, SKILLS, AND POWER NECESSARY TO FULFILL THE TERMS OF OUR SOCIAL CONTRACT. IT ALSO CONTAINS THE SUB-INITIATIVES:

FUTURE OF WORK AND INNOVATION ECONOMY INITIATIVE. THE FUTURE OF WORK AND INNOVATION ECONOMY INITIATIVE (FOWIE) IS A RESEARCH, STORYTELLING, TECHNICAL ASSISTANCE, AND POLICY INCUBATOR TO ENSURE THAT THE INNOVATION ECONOMY CREATES FAMILY-SUSTAINING JOBS, RELIABLE PATHWAYS INTO THOSE JOBS, AND EMERGING TECHNOLOGIES THAT MAKE WORK BETTER FOR ALL. FOWIE WORKS WITH LOCAL HIGHER EDUCATION, LABOR, AND WORKFORCE ORGANIZATIONS TO ALIGN POLICY AND PRACTICE.

PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP. THE PARTNERSHIP TO ADVANCE YOUTH APPRENTICESHIP (PAYA) IS A MULTI-YEAR, COLLABORATIVE INITIATIVE THAT SUPPORTS STATES AND CITIES IN THEIR EFFORTS TO EXPAND ACCESS TO HIGH-QUALITY APPRENTICESHIP OPPORTUNITIES FOR HIGH SCHOOL AGE YOUTH. THE PARTNERSHIP CONVENES AND MOBILIZES THE EXPERTISE, EXPERIENCE, AND COLLECTIVE NETWORKS OF NATIONAL, STATE, AND REGIONAL PARTNERS.

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STUDENT PARENT INITIATIVE. THE STUDENT PARENT INITIATIVE TEAM CONDUCTS RESEARCH, POLICY ANALYSIS, AND ADVOCACY WORK IN THE STUDENT PARENT SPACE. THE INITIATIVE BUILDS ON NEW AMERICA'S EXPERTISE IN FEDERAL ADVOCACY, COALITION-BUILDING AND WORK WITH HIGHER EDUCATION INSTITUTIONS AND STATES TO: RAISE AWARENESS ABOUT STUDENT PARENTS; BRING NEW VOICES AND PRACTITIONERS INTO THE FIELD; CONNECT RESEARCH, DATA, AND PROMISING PRACTICES TO ADVANCE POLICY SOLUTIONS FOR STUDENT PARENTS.

COMMUNITY COLLEGES. THE COMMUNITY COLLEGES INITIATIVE IS A RESEARCH AND CONVENING INITIATIVE THAT SYNTHESIZES POLICY AND PRACTICE FOR SUPPORTING EQUITABLE ACCESS, COMPLETION, AND LABOR MARKET ADVANCEMENT THROUGH THE IMPROVEMENT OF COMMUNITY COLLEGES; ADVOCATES FOR THE CREATION AND IMPLEMENTATION OF STATE AND FEDERAL POLICY THAT SUPPORTS COMMUNITY COLLEGES AND THEIR STUDENTS; AND FACILITATE LEARNING AND INNOVATION TO SUPPORT THE WIDE-SCALE ADOPTION OF STRATEGIES TO ADDRESS THE MOST PRESSING CHALLENGES FACING COMMUNITY COLLEGE STUDENTS AND THEIR INSTITUTIONS.

FUTURE OF LAND AND HOUSING: THE FUTURE OF LAND AND HOUSING PROGRAM AT NEW AMERICA AIMS TO HELP SOLVE TODAY'S PROPERTY RIGHTS CHALLENGES BY SHRINKING THE GULF BETWEEN TECHNOLOGISTS AND POLICYMAKERS. THROUGH OUR RESEARCH, WRITING, AND CONVENING, WE STRIVE TO BRING THESE TWO CONSTITUENTS INTO THE SAME ROOM. OUR GOAL IS TO ACT AS A BRIDGE, AS A TRANSLATOR BETWEEN THE WORLD OF DRONES, ARTIFICIAL INTELLIGENCE, AND SELF-SOVEREIGN IDENTITY, AND THE WORLD OF POLITICS, LAWS, AND INSTITUTIONS.

POLITICAL REFORM PROGRAM: THE POLITICAL REFORM PROGRAM SEEKS TO DEVELOP NEW STRATEGIES AND INNOVATIONS TO REPAIR THE DYSFUNCTION OF GOVERNMENT, RESTORE TRUST, AND REBUILD THE PROMISE OF AMERICAN DEMOCRACY BY WORKING TOWARDS AN OPEN, FAIR DEMOCRATIC PROCESS, WITH EQUITABLE OPPORTUNITIES FOR FULL PARTICIPATION, IN ORDER TO RESTORE DYNAMISM AND GROWTH TO THE AMERICAN ECONOMY AND SOCIETY. THE PROGRAM CONTAINS THESE INITIATIVES:

(1) THE NEW MODELS OF POLICY CHANGE INITIATIVE WORKS AT THE INTERSECTION OF POLITICS AND INTERNATIONAL AFFAIRS TO IDENTIFY OUTDATED POLICY PARADIGMS AND PROMOTE CREATIVE THINKING ABOUT HOW POLICY CHANGE HAPPENS, WHO MAKES POLICY, AND WHAT US INTERNATIONAL POLICY CANOR SHOULD BE.

(2) CONGRESSIONAL CAPACITY PROJECT: WORKING WITH THE R STREET INSTITUTE, WE HAVE ESTABLISHED THE LEGISLATIVE BRANCH CAPACITY WORKING GROUP, DIRECTED BY LEE DRUTMAN AND KEVIN KOSAR. THIS PROJECT CREATES AN ENDURING, BIPARTISAN SPACE TO ASSESS THE CAPACITY OF CONGRESS TO PERFORM ITS CONSTITUTIONAL DUTIES AND TO COLLABORATE ON IDEAS FOR IMPROVING THE LEGISLATIVE BRANCH'S PERFORMANCE IN OUR SEPARATION OF POWERS SYSTEM.

(3) THE CO-GOVERNANCE PROJECT AT NEW AMERICA IS KEEPING TRACK OF THESE EFFORTS AND IDENTIFYING THE BEST INNOVATIONS IN DEMOCRATIC REVITALIZATION BY ENGAGING ACTIVISTS, CITY OFFICIALS, RESIDENTS, PHILANTHROPISTS, NONPROFITS, AND BUSINESSES TO SEE WHAT KINDS OF INSTITUTIONS, ORGANIZATIONS, AND POLICIES PROMOTE THE GENUINE EMPOWERMENT OF COMMUNITIES.

BETTER LIFE LAB: THE BETTER LIFE LAB IS LEADING THE NATIONAL

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CONVERSATION ABOUT THE EVOLUTION OF GENDER ROLES AND NORMS, FAMILY POLICY, AND HOW WE WORK AND LIVE. THE PROGRAM SEEKS TO CREATE A PUBLIC ENVIRONMENT THAT'S HOSPITABLE TO CHANGE, THROUGH POWERFUL WRITING AND INFORMED DEBATE ABOUT CAREERS AND FAMILIES, THEIR STRENGTHS AND THEIR NEEDS.

NEW AMERICA CALIFORNIA: NEW AMERICA CA IS FOCUSED ON ISSUES OF RACIAL AND ECONOMIC EQUITY. WE UTILIZE HUMAN-CENTERED RESEARCH, STORYTELLING, AND CONVENINGS TO ELEVATE COMMUNITY MEMBERS' VOICES, NEEDS, AND EXPERTISE. CENTERING THE PEOPLE MOST PROXIMATE TO THE ISSUES, WE ACCELERATE ACTION ON EQUITY INNOVATIONS, HELPING SHIFT SYSTEMS SO THAT ALL CALIFORNIANS, PARTICULARLY THOSE MOST MARGINALIZED CAN THRIVE. NEW AMERICA CA CONCLUDED OPERATIONS AT NEW AMERICA AS OF DECEMBER 31, 2024.

NEW AMERICA CHICAGO: WE CONVENE COMMUNITY LEADERS, THOUGHT LEADERS, AND POLICYMAKERS COMMITTED TO FINDING PRACTICAL SOLUTIONS TO COMMUNITY CHALLENGES, PARTICULARLY THOSE RELATED TO WORK, INCOME, AND INEQUITY. BASED AT THE CHICAGO COMMUNITY TRUST, OUR TEAM CONNECTS PEOPLE IN UNDERINVESTED COMMUNITIES TO POLICYMAKERS AND THOSE IN POWER TO INFORM POLICY. WE WORK TO MAKE SURE TECHNOLOGICAL AND SOCIAL CHANGE WORK IN THE INTEREST OF ALL CHICAGOANS.

NEW PRACTICE LAB: THE NEW PRACTICE LAB PERFORMS A NEW FORM OF PUBLIC PROBLEM-SOLVING, WORKING AT THE INTERSECTION OF IDEAS AND ON-THE-GROUND EXPERIMENTATION TO IMPROVE THE DESIGN AND DELIVERY OF POLICIES FOCUSED ON FAMILY ECONOMIC SECURITY AND WELLBEING. THE NEW PRACTICE LAB FOCUSES ON POLICYMAKING THAT IS PEOPLE-CENTERED, EXPERIMENTAL, DATA-ENABLED, AND DESIGNED TO SCALE.

US@250: THE US@250 INITIATIVE (INITIALLY BUILT IN 2022 FOR PUBLIC LAUNCH IN 2023) PROVIDES A UNIFYING FRAMEWORK FOR THE SEMIQUINCENTENNIAL, HOSTS AN ANNUAL FELLOWSHIP, AND ORGANIZES A NETWORK OF ORGANIZATIONS, PROGRAMS, AND INDIVIDUALS WHO EXEMPLIFY AND CHAMPION THE SPIRIT OF INITIATIVE. THE US@250 FELLOWSHIP PROVIDES FUNDING, RESOURCES, AND COMMUNITY FOR AMERICANS WHO PUT THE US@250 VISION INTO PRACTICE: COMMUNITY LEADERS, CREATIVE ARTISTS, GRASSROOTS ORGANIZERS, AND CULTURAL EDUCATORS WHO ASPIRE TO TELL A FULLER, MORE COMPREHENSIVE AMERICAN STORY.

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

PUBLIC INTEREST TECHNOLOGY PROGRAM: THE PUBLIC INTEREST TECHNOLOGY PROGRAM CONNECTS TECHNOLOGISTS TO PUBLIC INTEREST ORGANIZATIONS TO IMPROVE SERVICES TO VULNERABLE COMMUNITIES AND STRENGTHEN LOCAL ORGANIZATIONS THAT SERVE THEM. IN 2024 THE PROGRAM FOCUSED PRIMARILY ON ONE INITIATIVE:

PIT UNIVERSITY NETWORK (PIT-UN) MISSION IS TO HELP ADVANCE THE FIELD OF PUBLIC INTEREST TECHNOLOGY TO BRING POSITIVE IMPACT TO COMMUNITIES AROUND THE GLOBE. WE FOCUS ON THE UNIVERSITY ECOSYSTEM SINCE THIS IS WHERE TALENT, SKILLS, AND IDEAS ARE BORN. THROUGH OUR NETWORK, CHALLENGE, AND CONTENT, WE EMPOWER PIT STUDENTS, FACULTY, AND PRACTITIONERS TO ACHIEVE THEIR GOALS. PIT-UN CONCLUDED OPERATIONS AT NEW AMERICA AS OF DECEMBER 31, 2024.

FUTURE TENSE: FUTURE TENSE IS A PARTNERSHIP BETWEEN NEW AMERICA AND

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ARIZONA STATE UNIVERSITY TO EXPLORE EMERGING TECHNOLOGIES AND THEIR TRANSFORMATIVE EFFECTS ON SOCIETY AND PUBLIC POLICY. CENTRAL TO THE PARTNERSHIP IS A SERIES OF EVENTS THAT TAKE IN-DEPTH, PROVOCATIVE LOOKS AT ISSUES THAT, WHILE LITTLE UNDERSTOOD TODAY, WILL DRAMATICALLY RESHAPE THE POLICY DEBATES OF THE COMING DECADE.

DIGITAL IMPACT AND GOVERNANCE INITIATIVE: THE DIGITAL IMPACT AND GOVERNANCE INITIATIVE (DIGI) DEVELOPS TECHNOLOGY PLATFORMS THAT TRANSFORM THE WAY INSTITUTIONS DELIVER VALUE FOR CITIZENS. THE PROGRAM WORKS WITH PARTNERS IN GOVERNMENT AND THE PRIVATE SECTOR TO CREATE MODULAR, INTEROPERABLE TECHNOLOGY SOLUTIONS BUILT ON OPEN SOURCE CODE THAT ADDRESS KEY CHALLENGES FACING THE PUBLIC SECTOR. THESE PLATFORMS PROVIDE 80 PERCENT SOLUTIONS, WITH GOVERNMENTS ABLE TO CUSTOMIZE THE LAST 20 PERCENT OF EACH PLATFORM TO MEET THEIR SPECIFIC NEEDS.

#SHARETHEMICINCYBER: THE #SHARETHEMICINCYBER FELLOWSHIP, HOSTED IN PARTNERSHIP BETWEEN #SHARETHEMICINCYBER AND NEW AMERICA, IS FOCUSED ON PROVIDING A PLATFORM FOR UNDER-REPRESENTED MID-CAREER CYBERSECURITY PROFESSIONALS OR THOSE TRANSITIONING INTO THE CYBER FIELD, AND PRESENTING OPPORTUNITIES FOR PROFESSIONAL DEVELOPMENT TO FURTHER THEIR CAREERS IN THE FIELD.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:
FUTURE FRONTLINES: FUTURE FRONTLINES USES OPEN SOURCE INVESTIGATIVE TOOLS, DATA MINING TECHNIQUES, AND JOURNALISTIC METHODS TO EXPLORE HOW THE DIGITAL REVOLUTION IS RESHAPING GLOBAL CONFLICT, COMPETITION AND INFLUENCE. FROM SATELLITE IMAGERY TO FLIGHT AND SHIPPING DATA TO SOCIAL MEDIA PLATFORMS, THE PROGRAM CONNECTS THE DOTS TO FERRET OUT FACTS THAT MIGHT OTHERWISE BE HIDDEN OR EVEN PURPOSELY OBSCURED FOR STRATEGIC REASONS. USING DATA THAT IS PUBLICLY ACCESSIBLE, THE PROGRAM'S AIM IS TO DISCERN CONNECTIONS, PATTERNS AND TRENDS THAT EXPLAIN HOW COMPETITION FOR ATTENTION AND INFLUENCE IN CYBERSPACE PLAYS OUT ONLINE AND IN THE REAL WORLD.

PLANETARY POLITICS: THE PLANETARY POLITICS INITIATIVE IS A CALL TO ACTION FOR REIMAGINING A MORE INCLUSIVE, EQUITABLE, AND SUSTAINABLE GLOBAL ORDER. IT PRODUCES RESEARCH, JOURNALISM, AND POLICY BRIEFS ROOTED IN THREE VALUES: POWER FLOWS FROM ADAPTATION; GLOBAL GOVERNANCE MUST BE INCLUSIVE; PEOPLE AND THE PLANET ARE THE PRIORITY. PROJECTS INCLUDE DIGITAL FUTURES (MAPPING DIGITAL HARMS AND DEVELOPING PRINCIPLES DIGITAL GOVERNANCE GLOBALLY), POWER REIMAGINED (CLIMATE STRATEGY), AND A FELLOWSHIP PROGRAM ELEVATING NEW VOICES IN THE SECURITY FIELD.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
OTHER PROGRAMS
EXPENSES $ 2,001,103.   INCLUDING GRANTS OF $ 366,608.  REVENUE $ 79,652.

FELLOWS PROGRAMS: THE NEW AMERICA NATIONAL FELLOWS PROGRAM INVESTS IN THINKERS-JOURNALISTS, SCHOLARS, FILMMAKERS, AND PUBLIC POLICY ANALYSTS-WHO GENERATE BIG, BOLD IDEAS THAT HAVE AN IMPACT AND SPARK NEW CONVERSATIONS ABOUT THE MOST PRESSING ISSUES OF OUR DAY.
EXPENSES $ 1,157,885.   INCLUDING GRANTS OF $ 619,000.  REVENUE $ 0.

FORM 990, PART VI, SECTION A, LINE 1A:
THE BOARD OF DIRECTORS MAY ELECT OR APPOINT ONE OR MORE COMMITTEES,

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INCLUDING BUT NOT LIMITED TO AN EXECUTIVE COMMITTEE, AND MAY DELEGATE TO ANY SUCH COMMITTEE OR COMMITTEES ANY OR ALL OF THEIR POWERS, PROVIDED THAT ANY COMMITTEE TO WHICH THE POWERS OF THE DIRECTORS ARE DELEGATED SHALL CONSIST SOLELY OF DIRECTORS, UNLESS THE DIRECTORS OTHERWISE DETERMINE. AN EXECUTIVE COMMITTEE ELECTED BY THE DIRECTORS SHALL HAVE THE POWER TO ACT FOR THE FULL BOARD OF DIRECTORS ON ALL MATTERS BETWEEN MEETINGS OF THE DIRECTORS, EXCEPT FOR SUCH MATTERS AS MAY BE PROVIDED BY LAW OR THE ARTICLES OF INCORPORATION.

FORM 990, PART VI, SECTION B, LINE 11B:
THE FORM 990 IS REVIEWED BY MANAGEMENT AND THE AUDIT/FINANCE COMMITTEE, AND A COPY IS SENT TO THE FULL BOARD BEFORE IT IS SIGNED BY A MEMBER OF THE EXECUTIVE TEAM AND FILED WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:
THE POLICY AND ITS APPLICATION ARE REVIEWED ANNUALLY FOR THE INFORMATION AND GUIDANCE OF OFFICERS, STAFF MEMBERS, FELLOWS, AND BOARD MEMBERS, EACH OF WHOM HAS A CONTINUING RESPONSIBILITY TO (A) SCRUTINIZE HIS OR HER TRANSACTIONS AND OUTSIDE BUSINESS INTERESTS AND RELATIONSHIPS FOR POTENTIAL CONFLICTS AND (B) MAKE SUCH DISCLOSURES AS DESCRIBED IN THE POLICY. THIS IS DOCUMENTED IN MEETING MINUTES.

EACH NEW AMERICA OFFICER, STAFF MEMBER, AND FELLOW ARE ASKED TO COMPLETE AND SIGN A CONFLICT OF INTEREST POLICY DISCLOSURE STATEMENT UPON HIS OR HER EMPLOYMENT. EACH NEW AMERICA BOARD MEMBER IS ASKED TO COMPLETE AND SIGN SUCH A STATEMENT UPON HIS OR HER ELECTION OR REELECTION TO THE BOARD, AND ANNUALLY THEREAFTER.

A MEMBER OF THE OPERATIONS TEAM MONITORS COMPLIANCE WITH THIS POLICY.

IF A CONFLICT OF INTEREST IS FOUND, THE INTERESTED PERSON IS EXCUSED AND NOT ALLOWED TO PARTICIPATE IN THE DISCUSSION OR VOTE ON THE MATTER.

FORM 990, PART VI, SECTION B, LINE 15:
THE BOARD OF DIRECTORS REVIEWS AND DETERMINES THE CHIEF EXECUTIVE OFFICER'S (CEO) COMPENSATION. NEW AMERICA COMPLETES A COMPENSATION STUDY, WHICH INCLUDES THE CEO (AND OTHER C-LEVEL SALARIES) EVERY 2-3 YEARS. THE ORGANIZATION UNDERWENT A COMPENSATION STUDY IN 2024. THE DISCUSSIONS AND DECISIONS, ANY CHANGES, AND STATUS UPDATES ARE REPORTED AT AND RECORDED IN THE MINUTES FOR THE MAIN BOARD MEETING.

IN GENERAL, ALL STAFF SALARIES ARE DETERMINED BY PEOPLE AND CULTURE IN CONSULTATION WITH THE RESPECTIVE PROGRAM DIRECTORS BASED ON SALARY GUIDELINES DEVELOPED OUT OF THE COMPENSATION REVIEW. THE SALARIES ARE REVIEWED AND APPROVED BY THE SENIOR LEADERSHIP TEAM AND/OR THE PRESIDENT/CTO.

THE PROCESS DESCRIBED HERE WAS LAST COMPLETED IN 2024.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:
AK,AL,AR,CA,CO,CT,DC,FL,GA,HI,IL,KS,KY,LA,MA,MD,ME,MI,MN,MS,NC,ND,NH,NJ,NM
NV,NY,OH,OK,OR,PA,RI,SC,TN,UT,VA,WA,WI,WV

FORM 990, PART VI, SECTION C, LINE 19:
THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST AND ON THE WEBSITE GUIDESTAR.ORG. THE

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CONFLICT OF INTEREST POLICY IS AVAILABLE ON NEW AMERICA'S WEBSITE.

FORM 990, PART IX, LINE 11G, OTHER FEES:

CONSULTANTS & SUBCONTRACTORS:

| | |
|---|---|
| PROGRAM SERVICE EXPENSES | 5,138,468. |
| MANAGEMENT AND GENERAL EXPENSES | 755,714. |
| FUNDRAISING EXPENSES | 91,528. |
| TOTAL EXPENSES | 5,985,710. |
| TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A | 5,985,710. |

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

| | |
|---|---|
| LOSS ON FOREIGN CURRENCY EXCHANGE | -5,183. |

FORM 990, PART XII, LINE 2C:

THE PROCESS FOR OVERSIGHT AND SELECTION OF AN INDEPENDENT ACCOUNTANT
HAS NOT CHANGED FROM THE PRIOR YEAR.