

Form **990-PF**

Department of the Treasury  
Internal Revenue Service

**Return of Private Foundation**  
or Section 4947(a)(1) Trust Treated as Private Foundation  
Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No. 1545-0047

**2022**

Open to Public Inspection

For calendar year **2022** or tax year beginning , and ending

Name of foundation <b>Foundation for a Healthy St. Petersburg, Inc.</b>		<b>A Employer identification number</b>  59-2592846
Number and street (or P.O. box number if mail is not delivered to street address) 2333 34th Street South	Room/suite	<b>B Telephone number</b>  (727) 865-4650
City or town, state or province, country, and ZIP or foreign postal code St. Petersburg, FL 33711		<b>C</b> If exemption application is pending, check here ... <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here ..... <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ..... <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ... <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 146,521,717.	<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... <input type="checkbox"/>
(Part I, column (d), must be on cash basis.)		

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received .....	965,914.			
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments .....				
	<b>4</b> Dividends and interest from securities .....	3,269,532.	3,355,004.	3,355,004.	
	<b>5a</b> Gross rents .....				
	<b>b</b> Net rental income or (loss) .....				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10 .....	19,785,376.			
	<b>b</b> Gross sales price for all assets on line 6a .....	453,754,574.			
	<b>7</b> Capital gain net income (from Part IV, line 2) .....		19,864,905.		
	<b>8</b> Net short-term capital gain .....			N/A	
	<b>9</b> Income modifications .....				
	<b>10a</b> Gross sales less returns and allowances .....				
<b>b</b> Less: Cost of goods sold .....					
<b>c</b> Gross profit or (loss) .....					
<b>11</b> Other income .....	17,461.	0.	17,461.		
<b>12 Total.</b> Add lines 1 through 11 .....	24,038,283.	23,219,909.	3,372,465.		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc. ....	706,759.	56,541.	0.	650,218.
	<b>14</b> Other employee salaries and wages .....	1,187,051.	94,964.	0.	1,092,087.
	<b>15</b> Pension plans, employee benefits .....	286,012.	22,881.	0.	263,131.
	<b>16a</b> Legal fees .....	237,151.	0.	0.	237,151.
	<b>b</b> Accounting fees .....	53,916.	5,392.	0.	48,525.
	<b>c</b> Other professional fees .....	2,239,541.	407,150.	0.	1,717,673.
	<b>17</b> Interest .....				
	<b>18</b> Taxes .....	479,930.	60,056.	0.	0.
	<b>19</b> Depreciation and depletion .....	601,130.	0.	0.	
	<b>20</b> Occupancy .....	585,266.	53,133.	0.	532,133.
	<b>21</b> Travel, conferences, and meetings .....	76,259.	6,491.	0.	69,768.
	<b>22</b> Printing and publications .....				
	<b>23</b> Other expenses .....	1,238,280.	20,377.	0.	1,217,902.
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 .....	7,691,295.	726,985.	0.	5,828,588.
	<b>25</b> Contributions, gifts, grants paid .....	1,239,059.			1,254,367.
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25 .....	8,930,354.	726,985.	0.	7,082,955.	
<b>27 Subtract line 26 from line 12:</b>					
<b>a</b> Excess of revenue over expenses and disbursements ...	15,107,929.				
<b>b Net investment income</b> (if negative, enter -0-) .....		22,492,924.			
<b>c Adjusted net income</b> (if negative, enter -0-) .....			3,372,465.		

Public Disclosure Copy

Foundation for a Healthy St. Petersburg, Inc.

Form 990-PF (2022)

59-2592846

Page 2

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only.		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	812,767.	1,384,004.	1,384,004.
	2 Savings and temporary cash investments	5,083,391.	2,060,428.	2,060,428.
	3 Accounts receivable			
	Less: allowance for doubtful accounts	21,406.		
	4 Pledges receivable	176,013.		
	Less: allowance for doubtful accounts	233,935.	176,013.	176,013.
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	262,887.	217,260.	217,260.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock	Stmt 9 120,197,746.	89,619,942.	89,619,942.
	c Investments - corporate bonds	Stmt 10 46,457,884.	46,754,415.	46,754,415.
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other	Stmt 11 100,000.	775,028.	775,028.	
14 Land, buildings, and equipment: basis	5,212,675.			
Less: accumulated depreciation	2,044,937.	3,688,649.	3,167,738.	
15 Other assets (describe Statement 12)	1,069,570.	2,366,889.	2,366,889.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	177,928,235.	146,521,717.	146,521,717.	
Liabilities	17 Accounts payable and accrued expenses	295,169.	724,487.	
	18 Grants payable	849,949.	799,441.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe Statement 13)	449,525.	1,674,307.	
23 Total liabilities (add lines 17 through 22)	1,594,643.	3,198,235.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions	175,225,697.	141,299,478.	
	25 Net assets with donor restrictions	1,107,895.	2,024,004.	
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances	176,333,592.	143,323,482.		
30 Total liabilities and net assets/fund balances	177,928,235.	146,521,717.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	176,333,592.
2 Enter amount from Part I, line 27a	2	15,107,929.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	191,441,521.
5 Decreases not included in line 2 (itemize) See Statement 8	5	48,118,039.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	143,323,482.

Form 990-PF (2022)

**Public Disclosure Copy**

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF (2022)

59-2592846

Page 3

**Part IV Capital Gains and Losses for Tax on Investment Income**

See Attached Statements

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e	453,754,574.	433,902,785.	19,864,905.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			19,864,905.

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 .....	2	19,864,905.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 .....	3	-19,171,759.

**Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), or 4948 - see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)	1	312,652.
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b) .....		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	2	0.
3	Add lines 1 and 2 .....	3	312,652.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- .....	5	312,652.
6	Credits/Payments:		
a	2022 estimated tax payments and 2021 overpayment credited to 2022 .....	6a	525,000.
b	Exempt foreign organizations - tax withheld at source .....	6b	0.
c	Tax paid with application for extension of time to file (Form 8868) .....	6c	0.
d	Backup withholding erroneously withheld .....	6d	0.
7	Total credits and payments. Add lines 6a through 6d .....	7	525,000.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached .....	8	0.
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than 7, enter <b>amount owed</b> .....	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> .....	10	212,348.
11	Enter the amount of line 10 to be: <b>Credited to 2023 estimated tax</b> 212,348. <b>Refunded</b> .....	11	0.

Form 990-PF (2022)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg, Inc.

Form 990-PF (2022)

59-2592846

Page 4

**Part VI-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? .....		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition ..... If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? .....		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ _____ 0. (2) On foundation managers. \$ _____ 0.		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____ 0.		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? .....		X
If "Yes," attach a detailed description of the activities.		
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes .....		X
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? .....	N/A	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....		X
If "Yes," attach the statement required by <i>General Instruction T</i> .		
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? .....		X
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV .....	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. _____ FL		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation .....	X	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the tax year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII .....		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....		X
<b>11</b> At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions .....		X
<b>12</b> Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions .....		X
<b>13</b> Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	X	
Website address <u>www.healthystpete.foundation</u>		
<b>14</b> The books are in care of <u>Carol Martin Brown</u> Telephone no. <u>(727) 865-4650</u> Located at <u>2333 34th Street South, St. Petersburg, FL</u> ZIP+4 <u>33711</u>		
<b>15</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> - check here .....		N/A
and enter the amount of tax-exempt interest received or accrued during the year .....		
<b>16</b> At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? .....		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		

Form 990-PF (2022)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF (2022)

59-2592846

Page 5

**Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
<b>1a</b> During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? .....	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(4)	X
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? .....	1a(5)	X
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) .....	1a(6)	X
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions .....	1b	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here .....		
<b>d</b> Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2022? .....	1d	X
<b>2</b> Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
<b>a</b> At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022? .....	2a	X
If "Yes," list the years _____, _____, _____, _____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement - see instructions.) .....	2b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. _____, _____, _____, _____		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? .....	3a	X
<b>b</b> If "Yes," did it have excess business holdings in 2022 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2022.) .....	3b	X
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022? .....	4b	X

Form 990-PF (2022)

**Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

	Yes	No
<b>5a</b> During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?		X
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	X	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		X
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	X	
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here		
<b>d</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? See Statement 15	X	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A		
<b>8</b> Is the foundation 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?		X

**Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

**1 List all officers, directors, trustees, and foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 14		706,759.	64,829.	0.

**2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Julie Rocco - 2333 34th Street South, St. Petersburg, FL 33711	Director of Grants Mgmt & Administr	126,252.	22,460.	0.
Belinda Childs - 2333 34th Street South, St. Petersburg, FL 33711	Controller	119,049.	15,262.	0.
Caroline Hepburn - 2333 34th Street South, St. Petersburg, FL 33711	Senior Director of Engagement	100,089.	771.	0.
Kyandra Darling - 2333 34th Street South, St. Petersburg, FL 33711	Innovation Officer	79,035.	20,386.	0.
Kewa Wright - 2333 34th Street South, St. Petersburg, FL 33711	Senior Administrator	85,416.	13,398.	0.
<b>Total</b> number of other employees paid over \$50,000				8

**Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
St. Petian Collaborative Inc. - 441 33rd Street North #1114, St. Petersburg, FL 33713	Consulting Services	273,165.
R. Edward Wilhoite, Jr P.O. Box 5989, Maryville, TN 37802	Consulting and Advisory Services	259,220.
Trenam Law P.O. Box 1102, Tampa, FL 33601-1102	Legal Services	228,892.
Nixon & Co Consulting Group LLC 1208 N Caldwell Street, Charlotte, NC 28206	Consulting Services	149,700.
Roundhouse Creative Inc. P.O. Box 15938, St. Petersburg, FL 33733	Communications Services	149,137.
<b>Total</b> number of others receiving over \$50,000 for professional services		13

**Part VIII-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<b>1</b> Influence Systems Change - See statement 19	1,548,201.
<b>2</b> Advancing Community Wealth to Health - See statement 19	1,286,689.
<b>3</b> Equity Movement Building - See statement 19	1,056,005.
<b>4</b>	

**Part VIII-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
<b>1</b> N/A	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	0.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF (2022)

59-2592846

Page 8

**Part IX Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities .....	1a	144,326,319.
b	Average of monthly cash balances .....	1b	4,758,836.
c	Fair market value of all other assets (see instructions) .....	1c	0.
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	149,085,155.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	1e	0.
2	Acquisition indebtedness applicable to line 1 assets .....	2	152,570.
3	Subtract line 2 from line 1d .....	3	148,932,585.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	2,233,989.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	146,698,596.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	7,334,930.

**Part X Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here  and do not complete this part.)

1	Minimum investment return from Part IX, line 6 .....	1	7,334,930.
2a	Tax on investment income for 2022 from Part V, line 5 .....	2a	312,652.
b	Income tax for 2022. (This does not include the tax from Part V.) .....	2b	
c	Add lines 2a and 2b .....	2c	312,652.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	7,022,278.
4	Recoveries of amounts treated as qualifying distributions .....	4	0.
5	Add lines 3 and 4 .....	5	7,022,278.
6	Deduction from distributable amount (see instructions) .....	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7	7,022,278.

**Part XI Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 .....	1a	7,082,955.
b	Program-related investments - total from Part VIII-B .....	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	2	82,426.
3 Amounts set aside for specific charitable projects that satisfy the:			
a	Suitability test (prior IRS approval required) .....	3a	
b	Cash distribution test (attach the required schedule) .....	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4	7,165,381.

Form 990-PF (2022)



Public Disclosure Copy

Foundation for a Healthy St. Petersburg, Inc.

Form 990-PF (2022)

59-2592846

Page 9

**Part XII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
<b>1</b> Distributable amount for 2022 from Part X, line 7 .....				7,022,278.
<b>2</b> Undistributed income, if any, as of the end of 2022:				
<b>a</b> Enter amount for 2021 only .....			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2022:				
<b>a</b> From 2017 .....	6,601,439.			
<b>b</b> From 2018 .....	1,162,467.			
<b>c</b> From 2019 .....	7,324,075.			
<b>d</b> From 2020 .....	3,800,276.			
<b>e</b> From 2021 .....	1,030,078.			
<b>f</b> Total of lines 3a through e .....	19,918,335.			
<b>4</b> Qualifying distributions for 2022 from Part XI, line 4: \$ 7,165,381.				
<b>a</b> Applied to 2021, but not more than line 2a ...			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) .....	0.			
<b>d</b> Applied to 2022 distributable amount .....				7,022,278.
<b>e</b> Remaining amount distributed out of corpus	143,103.			
<b>5</b> Excess distributions carryover applied to 2022 (If an amount appears in column (d), the same amount must be shown in column (a).) .....	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 .....	20,061,438.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b .....		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed .....		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions .....		0.		
<b>e</b> Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
<b>f</b> Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023 .....				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) .....	0.			
<b>8</b> Excess distributions carryover from 2017 not applied on line 5 or line 7 .....	6,601,439.			
<b>9</b> Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a .....	13,459,999.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2018 ...	1,162,467.			
<b>b</b> Excess from 2019 ...	7,324,075.			
<b>c</b> Excess from 2020 ...	3,800,276.			
<b>d</b> Excess from 2021 ...	1,030,078.			
<b>e</b> Excess from 2022 ...	143,103.			

**Public Disclosure Copy**

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF (2022)

59-2592846

Page 10

**Part XIII Private Operating Foundations** (see instructions and Part VI-A, question 9) N/A

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling \_\_\_\_\_

**b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year				(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
<b>b</b> 85% (0.85) of line 2a					
<b>c</b> Qualifying distributions from Part XI, line 4, for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XIV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

None

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:

See Statement 16

**b** The form in which applications should be submitted and information and materials they should include:

**c** Any submission deadlines:

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF (2022)

59-2592846

Page 11

**Part XIV** **Supplementary Information** *(continued)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
<b>Total</b> ..... See continuation sheet(s) .....			<b>3a</b>	1,254,367.
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> ..... See continuation sheet(s) .....			<b>3b</b>	768,316.

Form 990-PF (2022)



Public Disclosure Copy

Foundation for a Healthy St. Petersburg, Inc.

Form 990-PF (2022)

59-2592846

Page 13

**Part XVI Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash ..... **1a(1)**  Yes  No

(2) Other assets ..... **1a(2)**  Yes  No

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization ..... **1b(1)**  Yes  No

(2) Purchases of assets from a noncharitable exempt organization ..... **1b(2)**  Yes  No

(3) Rental of facilities, equipment, or other assets ..... **1b(3)**  Yes  No

(4) Reimbursement arrangements ..... **1b(4)**  Yes  No

(5) Loans or loan guarantees ..... **1b(5)**  Yes  No

(6) Performance of services or membership or fundraising solicitations ..... **1b(6)**  Yes  No

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees ..... **1c**  Yes  No

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		Tampa Bay Black Business Investment Corporation	See Statement 17
b5	200,000.	Tampa Bay Black Business Investment Corporation	
b6	85,000.	St. Petersburg Innovation District	
b6	35,000.	St. Petersburg Downtown Partnership	
b6	3,000.		

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ..... Yes  No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign Here** 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 taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee: \_\_\_\_\_ Date: \_\_\_\_\_ Title: Chief Financial and Admin Officer

May the IRS discuss this return with the preparer shown below? See instr.  Yes  No

**Paid Preparer Use Only**

Print/Type preparer's name: Terry Haefner  
 Preparer's signature: *Terry Haefner*  
 Date: 9/15/2023  
 Check if self-employed:   
 PTIN: P01258953  
 Firm's name: PYA, P.C.  
 Firm's EIN: 62-1517792  
 Firm's address: 3000 Bayport Drive, Suite 860, Tampa, FL 33607  
 Phone no.: (813) 424-3700

Form 990-PF (2022)

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Goldman Sachs Capital Gain Distributions			
b Goldman Sachs 6422		Various	Various
c Goldman Sachs 6422		Various	Various
d Goldman Sachs 8618		Various	Various
e Goldman Sachs 8618		Various	Various
f Goldman Sachs 0887		Various	Various
g Goldman Sachs 0887		Various	Various
h Goldman Sachs 0895		Various	Various
i Goldman Sachs 0895		Various	Various
j Goldman Sachs 0903		Various	Various
k Goldman Sachs 0911		Various	Various
l Goldman Sachs 0911		Various	Various
m Goldman Sachs 1232		Various	Various
n Goldman Sachs 1232		Various	Various
o Goldman Sachs 1323		Various	Various

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			13,116.
b 6,948,763.		7,126,384.	-177,621.
c 45,626,706.		43,938,502.	1,688,204.
d 207,045,035.		212,378,469.	-5,333,434.
e 3,767,538.		3,651,158.	116,380.
f 1,938,759.		2,278,645.	-339,886.
g 6,669,859.		5,381,460.	1,288,399.
h 14,844,449.		16,994,853.	-2,150,404.
i 13,628,207.		11,546,101.	2,082,106.
j 100,753.		117,360.	-16,607.
k 68,408,409.		77,784,610.	-9,376,201.
l 60,597,352.		30,713,537.	29,883,815.
m 7,055,568.		7,679,018.	-623,450.
n 5,290,434.		3,399,222.	1,891,212.
o 6,285,629.		7,435,048.	-1,149,419.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			13,116.
b			** -177,621.
c			1,688,204.
d			** -5,333,434.
e			116,380.
f			** -339,886.
g			1,288,399.
h			** -2,150,404.
i			2,082,106.
j			** -16,607.
k			** -9,376,201.
l			29,883,815.
m			** -623,450.
n			1,891,212.
o			** -1,149,419.

2 Capital gain net income or (net capital loss) ..... { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } .....	2
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 .....	3

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Goldman Sachs 1323		Various	Various
b Raymond James 2252		Various	Various
c Raymond James 2252		Various	Various
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,429,752.		3,352,795.	2,076,957.
b 79,245.		83,982.	-4,737.
c 38,116.		41,641.	-3,525.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			2,076,957.
b			** -4,737.
c			-3,525.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) ..... { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } .....	2	19,864,905.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 .....	3	-19,171,759.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
African American Heritage Association Inc. of St. Petersburg, FL 2240 Ninth Avenue South St. Petersburg, FL 33712		501(c)3 Private Nonoperating F	To accelerate racial equity by increasing awareness of how structural racism continues to influence contemporary discussions and decisions regarding equity and imposes unique, substantial stressors on the daily lives of Black people.	40,508.
Alianza Center 10524 Moss Park Rd. Orlando, FL 32832		501(c)3 Public Charity	To support COVID-19 Delta Surge disease mitigation efforts to connect LatinX residents in low-vaccinated zip codes throughout Pinellas County with access to COVID-19 awareness and vaccines.	2,000.
Bay Area Chamber Foundation 100 2nd Avenue N St. Petersburg, FL 33701		501(c)3 Public Charity	To accelerate racial equity by increasing access and opportunity for BIPOC individuals to participate in Leadership St. Pete and to support ongoing leadership development activities.	10,000.
Community Foundation of Tampa Bay, Inc. 4300 W. Cypress Street, Suite 700 Tampa, FL 33607		501(c)3 Public Charity	To influence systems change by creating equitable digital access to all residents in St. Petersburg and broader Pinellas County via Digital Inclusion St. Petersburg.	67,500.
Community Health Centers of Pinellas, Inc. D.B.A. Evara Health 14100 58th St N Clearwater, FL 33760-9900		501(c)3 Public Charity	To support COVID-19 disease mitigation by organizing faith leaders to leverage impactful messaging to encourage COVID vaccinations in BIPOC communities.	2,500.
Community Resources and Solutions P.O. Box 10366 St. Petersburg, FL 33733		501(c)3 Public Charity	To accelerate racial equity via the provision of supportive capacity with an emphasis on Black future and celebration.	5,000.
Council on Foundations 1255 23rd St, NW, Suite 200 Washington DC, DC 20037		501(c)3 Public Charity	General operating support for the Council on Foundations to enhance philanthropic practices nationwide.	10,000.
<b>Total from continuation sheets</b>				1,254,367.



Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Dr. Carter G Woodson African American Museum, Inc. 2240 9th Ave S St. Petersburg, FL 33712		501(c)3 Public Charity	To support fund development capacity for the creation of a newly constructed African American History Museum.	47,500.
Dr. Carter G Woodson African American Museum, Inc. 2240 9th Ave S St. Petersburg, FL 33712		501(c)3 Public Charity	Return of unused grant funds used to accelerate racial equity by supporting local civic engagement efforts focused on historically marginalized and hard to reach populations.	-21,175.
Florida Department of Health in Pinellas County 205 Dr. Martin Luther King Jr. Street North St. Petersburg, FL 33701		Government: State	To influence systems change by supporting a "health in all policies" approach by partnering with local municipalities to bring health and equity considerations into the development/ implementation of all policies, programs, and services	106,969.
Grantmakers for Effective Organizations 1310 L Street NW, Suite 650 Washington, DC 20005		501(c)3 Public Charity	To influence systems change by providing general operating support focused on building a strong and sustainable organizational infrastructure that will enable the organization to yield the greatest impact.	2,090.
Grantmakers in Health 1100 Connecticut Avenue NW, Suite 1100 Washington DC, DC 20036		501(c)3 Public Charity	To influence systems change by providing general operating support focused on building a strong and sustainable organizational infrastructure that will enable the organization to yield the greatest impact.	13,500.
Grantmakers in Health 1100 Connecticut Avenue NW, Suite 1100 Washington DC, DC 20036		501(c)3 Public Charity	To provide general operating support for the provision of capacity building and expanded learning within the field of philanthropy.	25,000.
Hispanic Chamber of Commerce Pinellas County 136 4th St. N. St. Petersburg, FL 33701		501(c)3 Public Charity	To accelerate racial equity through the provision of supportive capacity for the Hispanic Chamber of Commerce of Pinellas County.	7,500.
<b>Total from continuation sheets</b>				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Homeless Leadership Alliance of Pinellas Inc. 647 1st Avenue North, 2nd Floor St. Petersburg, FL 33701		501(c)3 Public Charity	To influence systems change by piloting an assessment and service delivery system for diversion interventions that begins prior to a system entry point for homelessness for families with minor children.	5,000.
In Touch With Communities Around the World, Inc. DBA Arts Conservatory for 8626 Miramar Terrace Circle Tampa, FL 33637		501(c)3 Public Charity	To accelerate racial equity via support for the creation of an affinity space for Black males to converse, convene, and celebrate.	28,500.
League of Women Voters of the St. Petersburg Area, Inc. 2335 22nd Ave. S., Suite 5 St. Petersburg, FL 33712		501(c)4 Civic League and Socia	To accelerate racial equity via implementation of an equitable community-based food system supported by the St. Pete Food Policy Council.	23,750.
League of Women Voters of the St. Petersburg Area, Inc. 2335 22nd Ave. S., Suite 5 St. Petersburg, FL 33712		501(c)4 Civic League and Socia	Return of unused grant funds used to collectively plan, engage, empower, and increase the knowledge of residents in order to move them into action towards community change.	-8,406.
Mount Zion Human Services, Inc. 945 20th Street St. Petersburg, FL 33712		501(c)3 Public Charity	To advance community wealth to health by serving community entrepreneurs and organizations to access COVID relief & resiliency funding, build resiliency capacity, and strengthen business development programs.	160,625.
New Visions of the Well 833 22nd Street South, Suite B St. Petersburg, FL 33712		501(c)3 Public Charity	To influence systems change via planning a Trauma Recovery Center and Healing Justice space focused on Black, Indigenous, and Persons of Color affected by trauma, crime, and violence and training practitioners who serve them.	71,250.
Philanthropy Southeast (previously Southeastern Council of Foundations) 100 Peachtree Street, Suite 2080 Atlanta, GA 30303		501(c)3 Public Charity	To provide general operating support for the advancement of philanthropy in the Southeastern United States.	10,290.
<b>Total from continuation sheets</b>				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Pinellas County Urban League, Inc. 333 31st Street North St. Petersburg, FL 33713		501(c)3 Public Charity	To increase organizational capacity via the provision of general operating support to build a strong and sustainable organizational infrastructure.	47,500.
Pinellas County Urban League, Inc. 333 31st Street North St. Petersburg, FL 33713		501(c)3 Public Charity	To accelerate racial equity by bringing the lynching memorial to St. Petersburg, installing it on land donated by the City of St. Pete	960.
Pinellas County Urban League, Inc. 333 31st Street North St. Petersburg, FL 33713		501(c)3 Public Charity	To support COVID-19 disease mitigation by strategically investing in support for the COVID Vaccine and Flu Vaccination Community Outreach Project.	2,500.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	To accelerate racial equity via the provision of support to the Youth Farm Project at Enoch Davis and their efforts to create youth leaders, community connections, and access to healthy foods.	2,250.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	To influence systems change by supporting equity in education via greater awareness of inequities among student groups; improvements in organizational structure that values diversity; and increased programming that closes achievement gaps.	5,000.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	To influence systems change by advancing equity in education via a focus on deepening understanding, developing organizational capacity, and creating an equity plan to contribute towards systemic growth.	131,250.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	To influence systems change a strategic partnership to further equitable educational outcomes, boost education quality for all Pinellas County students, and have a baseline of data through research reports to take action.	48,650.
<b>Total from continuation sheets</b>				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Pinellas Ex-Offender Re-Entry Coalition Inc. 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To influence systems change via exploration of a syringe exchange model for Pinellas County.	25,000.
Pinellas Opportunity Council, Inc. 501 1st Avenue N, Suite 517 St. Petersburg, FL 33701		501(c)3 Public Charity	To accelerate racial equity by building the capacity of faith-based human services organization to meet the unique needs of BIPOC individuals accessing community services.	163,875.
St. Petersburg Innovation District, Inc. 450 8th Ave SE St. Petersburg, FL 33701		501(c)6 Business League	To advance community wealth to health by supporting digital inclusion efforts creating equitable access to broadband services and technology in St. Petersburg.	2,500.
Stetson University, Inc. 1401 61st Street South Gulfport, FL 33707		501(c)3 Public Charity	To accelerate racial equity via civic awareness and engagement of BIPOC youth.	25,014.
Suncoast Center, Inc. PO Box 10970 St. Petersburg, FL 33711		501(c)3 Public Charity	To influence systems change by supporting efforts to create equitable access to a coordinated behavioral health system that provides optimal services and supports provided by the Wellness Connection collaborative.	3,750.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To accelerate racial equity through the provision of supports needed to gain equitable access to resources and increase organizational capacity.	47,500.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To accelerate systems change via capacity building for BIPOC businesses.	23,750.
<b>Total from continuation sheets</b>				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a Grants and Contributions Paid During the Year**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Tampa Bay Network to End Hunger, Inc. 4532 W. Kennedy Blvd., Suite 252 Tampa, FL 33609		501(c)3 Public Charity	To influence systems change by supporting St Pete Food Policy Council in their efforts to create an equitable community-based food system.	10,000.
University of South Florida Research Foundation, Inc. 3802 Spectrum Blvd, Suite 100 Tampa, FL 33612		501(c)3 Public Charity	To influence systems change by enhancing capacity of organizations serving infants and families in Pinellas County to become centered in race based trauma and increasing the number of and support for practitioners that are people of color.	58,072.
University of South Florida Research Foundation, Inc. 3802 Spectrum Blvd, Suite 100 Tampa, FL 33612		501(c)3 Public Charity	To accelerate racial equity by evaluating Community Assistance and Life Liaison which provides a therapeutic, wrap-around response to emergency calls to SPPD with the goal of reducing police involvement with non-violent, non-criminal calls.	38,745.
University of South Florida Research Foundation, Inc. 3802 Spectrum Blvd, Suite 100 Tampa, FL 33612		501(c)3 Public Charity	To accelerate racial equity by deepening the community's understanding of climate and environmental justice and work to create a community action plan to address environmental inequities impacting population health.	5,000.
We Care LF Inc 204 Pompano Drive SE, Unit B St. Petersburg, FL 33705		501(c)3 Public Charity	To support COVID-19 disease mitigation through the hiring of nursing staff to support Pinellas Department of Health in COVID-19 vaccination efforts for low vaccinate zip codes in Pinellas County.	800.
We Care LF Inc 204 Pompano Drive SE, Unit B St. Petersburg, FL 33705		501(c)3 Public Charity	To support COVID-19 disease mitigation via the creation of a partnership between WE Care LF and Pinellas Department of Health in support of deploying nurses in BIPOC communities throughout Pinellas County reporting a low vaccine rate.	600.
We Care LF Inc 204 Pompano Drive SE, Unit B St. Petersburg, FL 33705		501(c)3 Public Charity	To support COVID-19 disease mitigation via hiring of nursing staff to support Pinellas Department of Health in COVID-19 vaccination efforts for low vaccinated zip codes in Pinellas County.	700.
<b>Total from continuation sheets</b>				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3a** Grants and Contributions Paid During the Year

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
We Care LF Inc 204 Pompano Drive SE, Unit B St. Petersburg, FL 33705		501(c)3 Public Charity	To support COVID-19 disease mitigation via hiring of nursing staff to support Pinellas Department of Health in COVID-19 vaccination efforts for low vaccinated zip codes in Pinellas County.	1,050.
<b>Total from continuation sheets</b> .....				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3b Grants and Contributions Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Bay Area Legal Services, Inc. 4948 Central Avenue St. Petersburg, FL 33707		501(c)3 Public Charity	To influence systems change by measuring and addressing pandemic impact on marginalized communities in regards to accessing legal services.	80,000.
Community Foundation of Tampa Bay, Inc. 4300 W. Cypress Street, Suite 700 Tampa, FL 33607		501(c)3 Public Charity	To create equitable digital access to all residents in St. Petersburg and broader Pinellas County via Digital Inclusion St. Petersburg.	82,500.
Dr. Carter G Woodson African American Museum, Inc. 2240 9th Ave S St. Petersburg, FL 33712		501(c)3 Public Charity	To support fund development capacity for the creation of a newly constructed African American History Museum.	52,500.
Florida Philanthropic Network 12157 W. Linebaugh Ave., Suite 384 Tampa, FL 33626		501(c)3 Public Charity	To influence systems change via the provision of general operating support to enhance philanthropic practices in the local region.	25,000.
New Visions of the Well 833 22nd Street South, Suite B St. Petersburg, FL 33712		501(c)3 Public Charity	To influence systems change via planning a Trauma Recovery Center and Healing Justice space focused on Black, Indigenous, and Persons of Color affected by trauma, crime, and violence and training practitioners who serve them.	3,750.
Pinellas Community Foundation 17755 US Hwy 19 N, Ste 150 Clearwater, FL 33764		501(c)3 Public Charity	To increase organizational capacity through general operating support.	10,000.
Pinellas Opportunity Council, Inc. 501 1st Avenue N, Suite 517 St. Petersburg, FL 33701		501(c)3 Public Charity	To influence systems change by creating and supporting a local Black male affinity group.	50,000.
<b>Total from continuation sheets</b>				768,316.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

Page 11

**Part XIV** Supplementary Information (continued)

**3b Grants and Contributions Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Stetson University, Inc. 1401 61st Street South Gulfport, FL 33707		501(c)3 Public Charity	To accelerate racial equity via civic awareness and engagement of BIPOC youth.	1,316.
Suncoast Center, Inc. P.O. Box 10970 St. Petersburg, FL 33711		501(c)3 Public Charity	To address mental health and wellness via a collective impact model and ongoing countywide collaboration among service providers.	58,250.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To increase the capacity of grassroots organizations to secure American Rescue Plan Act funding issued in St. Pete and Pinellas County.	2,500.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To accelerate systems change via capacity building for BIPOC businesses.	26,250.
The Henry J. Kaiser Family Foundation 185 Berry St #2000 San Francisco, CA 94107-1704		501(c)3 Public Charity	To support equity in journalism via a partnership between KFF and Tampa Bay Times.	150,000.
Times Publishing Company 490 1st Ave S St. Petersburg, FL 33701		Business: For Profit	To accelerate racial equity via support of local journalism efforts that are focused on race and systemic racism.	76,250.
University of South Florida Research Foundation, Inc. 3802 Spectrum Blvd, Suite 100 Tampa, FL 33612		501(c)3 Public Charity	To address mental health and well being for BIPOC via race equity evaluation of the Community Assistance and Life Liaison (CALL).	50,000.
<b>Total from continuation sheets</b>				



Public Disclosure Copy

Foundation for a Healthy St. Petersburg,  
Inc.

Form 990-PF

59-2592846

**Part XIV Supplementary Information** (continued)

**3b Grants and Contributions Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Your Real Stories, Inc. 4465 Trout Dr SE St. Petersburg, FL 33705		501(c)3 Public Charity	To address mental health and wellness for BIPOC and Economic Equity and Justice by supporting the artistic expression of needs and opportunities.	100,000.

**Total from continuation sheets** .....

Foundation for a Healthy St. Petersburg,

59-2592846

Form 990-PF	Dividends and Interest from Securities				Statement 1
Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Goldman Sachs Regions	3,269,532.	0.	3,269,532.	3,350,299.	3,350,299.
	0.	0.	0.	4,705.	4,705.
To Part I, line 4	3,269,532.	0.	3,269,532.	3,355,004.	3,355,004.

Form 990-PF	Other Income			Statement 2
Description	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income	
Interest on Federal Tax Refund	13,859.	0.	13,859.	
Other Revenue	3,602.	0.	3,602.	
Total to Form 990-PF, Part I, line 11	17,461.	0.	17,461.	

Form 990-PF	Legal Fees				Statement 3
Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Legal Fees	237,151.	0.	0.	237,151.	
To Fm 990-PF, Pg 1, ln 16a	237,151.	0.	0.	237,151.	

Form 990-PF	Accounting Fees				Statement 4
Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Accounting Fees	53,916.	5,392.	0.	48,525.	
To Form 990-PF, Pg 1, ln 16b	53,916.	5,392.	0.	48,525.	

## Form 990-PF

## Other Professional Fees

## Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Other Professional Fees	1,746,174.	29,774.	0.	1,717,673.
Investment Management Investment Expenses - Sparkplug Portfolio Investments	493,367. 0.	376,102. 1,274.	0. 0.	0. 0.
To Form 990-PF, Pg 1, ln 16c	2,239,541.	407,150.	0.	1,717,673.

## Form 990-PF

## Taxes

## Statement 6

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Federal Excise Tax	331,106.	0.	0.	0.
Federal Income Tax	148,824.	0.	0.	0.
Foreign Taxes from Investments	0.	60,056.	0.	0.
To Form 990-PF, Pg 1, ln 18	479,930.	60,056.	0.	0.

## Form 990-PF

## Other Expenses

## Statement 7

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Marketing and Communications Direct Community Investment Technology	479,930. 296,894. 251,499.	331. 0. 8,841.	0. 0. 0.	479,599. 296,894. 242,658.
Other Administrative Expenses	106,995.	6,903.	0.	100,092.
Office Operations	58,253.	4,302.	0.	53,950.
Expenses from Discontinued Operations	27,896.	0.	0.	27,896.
Evaluation	16,813.	0.	0.	16,813.
To Form 990-PF, Pg 1, ln 23	1,238,280.	20,377.	0.	1,217,902.

Foundation for a Healthy St. Petersburg,

59-2592846

---



---

Form 990-PF      Other Decreases in Net Assets or Fund Balances      Statement 8

---

Description	Amount
Unrealized Loss on Investments	48,116,040.
Other Adjustment	1,999.
Total to Form 990-PF, Part III, line 5	<u>48,118,039.</u>

---



---

Form 990-PF      Corporate Stock      Statement 9

---

Description	Book Value	Fair Market Value
Aperio: Custom (S&P 500)	52,450,513.	52,450,513.
Aperio: Custom (MSCI EAFE)	11,306,167.	11,306,167.
FTSE Developed All Cap EX US Index Fund (Vanguard)	5,622,931.	5,622,931.
William Blair: Non-US Equity (SMA)	5,609,626.	5,609,626.
Nuveen: Small Cap Value	4,831,265.	4,831,265.
Granite: Small/Mid Cap Core	4,740,386.	4,740,386.
RBC Emerging Markets Equity Fund	2,837,947.	2,837,947.
Fidelity Large Cap Value Index Fund	2,221,107.	2,221,107.
Total to Form 990-PF, Part II, line 10b	<u>89,619,942.</u>	<u>89,619,942.</u>

---



---

Form 990-PF      Corporate Bonds      Statement 10

---

Description	Book Value	Fair Market Value
Ishares Short-term Corporate Bond	19,206,706.	19,206,706.
TIAA-CREF Core Impact Bond Fund	12,788,967.	12,788,967.
Eaton Vance Income Fund of Boston	7,363,174.	7,363,174.
Federated Hermes High Yield Bond Fund	7,326,625.	7,326,625.
TCW Met West Unconstrained Bond Fund	38,679.	38,679.
Pacific Funds Floating Rate Income Fund	30,264.	30,264.
Total to Form 990-PF, Part II, line 10c	<u>46,754,415.</u>	<u>46,754,415.</u>

Foundation for a Healthy St. Petersburg,

59-2592846

Form 990-PF

Other Investments

Statement 11

Description	Valuation Method	Book Value	Fair Market Value
Private Credit Managers IV Offshore LP	FMV	445,103.	445,103.
Vintage IX B Offshore SCSP	FMV	190,000.	190,000.
Certificate of Deposit	COST	100,000.	100,000.
Black Equity Opportunities Offshore SCSP	FMV	39,925.	39,925.
<b>Total to Form 990-PF, Part II, line 13</b>		<b>775,028.</b>	<b>775,028.</b>

Form 990-PF

Other Assets

Statement 12

Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Right to Use Asset - Operating Lease	0.	1,365,035.	1,365,035.
Recoverable Grant Receivable - Loan Funds	600,000.	682,975.	682,975.
Income Tax Refunds and Credits Receivable (net)	344,811.	200,000.	200,000.
Investment in Spark Plug	100,000.	100,000.	100,000.
Security Deposit	18,077.	18,077.	18,077.
Other Receivable	6,682.	802.	802.
<b>To Form 990-PF, Part II, line 15</b>	<b>1,069,570.</b>	<b>2,366,889.</b>	<b>2,366,889.</b>

Form 990-PF

Other Liabilities

Statement 13

Description	BOY Amount	EOY Amount
Lease Liability	0.	1,521,737.
Professional/General Claims	202,987.	152,570.
Deferred Rent	163,435.	0.
Accrued Retirement	83,103.	0.
<b>Total to Form 990-PF, Part II, line 22</b>	<b>449,525.</b>	<b>1,674,307.</b>

Form 990-PF

Part VII - List of Officers, Directors  
Trustees and Foundation Managers

Statement 14

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	Expense Account
Randall H. Russell 2333 34th Street South St. Petersburg, FL 33711	President/CEO 50.00	242,543.	21,625.	0.
Carl Lavender 2333 34th Street South St. Petersburg, FL 33711	VP and Interim Co-CEO 50.00	234,650.	14,520.	0.
Carol Martin Brown 2333 34th Street South St. Petersburg, FL 33711	Chief Financial and Admin. Officer 50.00	229,566.	28,684.	0.
Michele Alexandre 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Stacy Conroy 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Marianne F. Edmonds 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Michael C. Funsch 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Sharon Gardner 2333 34th Street South St. Petersburg, FL 33711	Treasurer 1.00	0.	0.	0.
Rev. Kenneth F. Irby 2333 34th Street South St. Petersburg, FL 33711	Vice Chair 1.00	0.	0.	0.
Emery M. Ivery 2333 34th Street South St. Petersburg, FL 33711	Secretary 1.00	0.	0.	0.

Foundation for a Healthy St. Petersburg,

59-2592846

Katurah Jenkins-Hall, Ph.D. 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
---	-----------------	----	----	----

Kelly M. Kirschner 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
--	-----------------	----	----	----

Donna J. Petersen, Sc. D., MHS 2333 34th Street South St. Petersburg, FL 33711	Chair 1.00	0.	0.	0.
--	---------------	----	----	----

Kevin Sneed, FNAP, FNAPHA 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
---	-----------------	----	----	----

Lorna L. Taylor 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
---	-----------------	----	----	----

Nichelle Threadgill, M.D. 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
---	-----------------	----	----	----

Totals included on 990-PF, Page 6, Part VII

706,759.	64,829.	0.
----------	---------	----

Grantee's Name

League of Women Voters of the St. Petersburg Area, Inc.

Grantee's Address

2335 22nd Ave. S. Suite #5  
St. Petersburg, FL 33712

<u>Grant Amount</u>	<u>Date of Grant</u>	<u>Amount Expended</u>	<u>Verification Date</u>
50,000.	12/20/21	23,750.	06/16/22

Purpose of Grant

To accelerate race equity via implementation of an equitable community-based food system supported by the St. Pete Food Policy Council.

Dates of Reports by Grantee

06/16/22

Any Diversion by Grantee

To the knowledge of the grantor, there have been no diversions

Results of Verification

Dollars have been used for a charitable purpose as intended in the grant agreement.



Foundation for a Healthy St. Petersburg,59-2592846Grantee's Name

St. Petersburg Innovation District, Inc.

Grantee's Address140 7th Avenue South  
St. Petersburg, FL 33701-5016

<u>Grant Amount</u>	<u>Date of Grant</u>	<u>Amount Expended</u>	<u>Verification Date</u>
25,000.	07/06/21	2,500.	03/03/23

Purpose of Grant

To advance community wealth to health by supporting digital inclusion efforts creating equitable access to broadband services and technology in St. Petersburg.

Dates of Reports by Grantee

03/03/23

Any Diversion by Grantee

To the knowledge of the grantor, there have been no diversions

Results of Verification

Dollars have been used for a charitable purpose as intended in the grant agreement.

Form 990-PF

Grant Application Submission Information  
Part XIV, Lines 2a through 2d

Statement 16

Name and Address of Person to Whom Applications Should be Submitted

Foundation for a Healthy St. Petersburg, Inc.  
2333 34th Street South  
St. Peterburg, FL 33711

Telephone Number

727-865-4650

Email Address

info@healthystpete.foundation

Form and Content of Applications

In 2022, the Foundation distributed grant funds on an ongoing basis through a process of continuous engagement with community stakeholders. Proposals from nonprofits, governmental agencies, and other qualifying organizations that aligned with the Foundation's mission and strategy were submitted via an invitation. This process, known as the Equity Thinker, was used throughout 2022.

In 2023, the Foundation is using a Request for Proposal (RFP) process whereby grants will be accepted within a specified timeframe and completed by applicants using an online grants portal. The portal may be found at <https://healthystpete.foundation/>. A limited number of grant awards may be issued during the year outside of the Foundation's RFP process.

Any Submission Deadlines

In 2022, rolling submissions throughout the year.  
In 2023, deadline varies according to grant type.

Restrictions and Limitations on Awards

All grants must align with the Foundation's mission to achieve health equity via racial equity. More information regarding our mission may be found at <https://healthystpete.foundation/>.

990-PF Involvement With Noncharitable Organizations Statement 17  
Part XVI, Line 1, Column (d)

Name of Noncharitable Exempt Organization

Tampa Bay Black Business Investment Corporation

Description of Transfers, Transactions, and Sharing Arrangements

Race Equity Loan Fund Funding - \$200,000

Name of Noncharitable Exempt Organization

Tampa Bay Black Business Investment Corporation

Description of Transfers, Transactions, and Sharing Arrangements

Racial Equity Loan Fund administration services - \$85,000

Name of Noncharitable Exempt Organization

St. Petersburg Innovation District

Description of Transfers, Transactions, and Sharing Arrangements

Membership fee - \$35,000

Name of Noncharitable Exempt Organization

St. Petersburg Downtown Partnership

Description of Transfers, Transactions, and Sharing Arrangements

Membership fee - \$3,000

---

---

General Explanation

Statement 18

---

Form/Line Identifier and Description/Return Reference

---

Part VII-B Line 1a(4) - Compensation Paid to a Disqualified Person

Explanation:

Foundation for a Healthy St. Peterburg paid reasonable compensation to the following individuals for their service to the organization:

- Randall H. Russell, President & CEO
- Carol Martin Brown, VP and Interim Co-CEO
- Carl Lavender, VP and Interim Co-CEO

## Form/Line Identifier and Description/Return Reference

## Part VIII-A - Summary of Direct Charitable Activities

## Explanation:

## 1 Influence Systems Change \$1,548,201

The Foundation seeks to identify and change elements of multisector systems that result in discriminatory outcomes, and actively works to influence social policy through data, analysis, and solutions. Those solutions require advocacy efforts to inform and engage those systems leaders who can change policies impacting race equity. In order to thoroughly support the policy analysis, the Foundation includes research and data collection, evaluation, public education, and other initiatives to influence policies in pursuit of the Organization's mission. The costs of operating the Center for Health Equity are allocated to Influence Systems Change.

## 2 - Advancing Community Wealth to Health \$1,286,689

The Foundation adopts a theory of change in which the advancement of community wealth leads to advancements in community health. The Foundation defines community wealth comprehensively, including financial wealth, opportunity, and resilience, all of which are required to counteract decades of racist systems. During 2022, the Foundation advanced its initiative to convene anchor institutions around issues of racial equity in wealth and health, invested in a community listening initiative to identify areas of greatest need in the South St. Petersburg Community Redevelopment Area, and awarded grants in support of economic development for BIPOC businesses, non-profits, and communities.

## 3 Equity Movement Building \$1,056,005

The Foundation accelerates social change to advance health equity through race equity. Moving along the continuum from awareness of inequity to action in the fulfilment of a social change mission involves a multi-faceted, multi-sector approach to community engagement. This includes education and awareness building with multi-platform messaging, gauging community needs through convenings, and cultivating opportunities for deeper engagement in race equity.