

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 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

For calendar year **2023** or tax year beginning , and ending

Name of foundation Foundation for a Healthy St. Petersburg Inc.		A Employer identification number 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 Telephone number (727) 865-4650
City or town, state or province, country, and ZIP or foreign postal code St. Petersburg, FL 33711		C If exemption application is pending, check here ...
G Check all that apply: Initial return Initial return of a former public charity Final return Amended return Address change Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ...
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 161,224,435.	J Accounting method: Cash <input type="checkbox"/> Accrual <input checked="" type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ...

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)				
Revenue				
1 Contributions, gifts, grants, etc., received	1,022,686.			
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	3,959,875.	4,034,098.	4,034,098.	Statement 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	27,904.			
b Gross sales price for all assets on line 6a	40,350,842.			
7 Capital gain net income (from Part IV, line 2)		45,305.		
8 Net short-term capital gain			N/A	
9 Income modifications				
10a Gross sales less returns and allowances				
b Less: Cost of goods sold				
c Gross profit or (loss)				
11 Other income	7,402.	0.	7,402.	Statement 2
12 Total. Add lines 1 through 11	5,017,867.	4,079,403.	4,041,500.	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	528,986.	52,899.	0.	476,087.
14 Other employee salaries and wages	1,640,855.	164,085.	0.	1,476,769.
15 Pension plans, employee benefits	468,552.	46,855.	0.	421,697.
16a Legal fees	124,906.	0.	0.	124,906.
b Accounting fees	46,255.	4,625.	0.	41,630.
c Other professional fees	1,552,355.	619,080.	0.	952,178.
17 Interest				
18 Taxes	33,311.	68,207.	0.	0.
19 Depreciation and depletion	622,976.	0.	0.	
20 Occupancy	606,933.	60,693.	0.	546,240.
21 Travel, conferences, and meetings	63,007.	6,301.	0.	56,706.
22 Printing and publications				
23 Other expenses	1,194,138.	35,484.	0.	1,158,656.
24 Total operating and administrative expenses. Add lines 13 through 23	6,882,274.	1,058,229.	0.	5,254,869.
25 Contributions, gifts, grants paid	3,328,460.			1,028,026.
26 Total expenses and disbursements. Add lines 24 and 25	10,210,734.	1,058,229.	0.	6,282,895.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements ...	-5,192,867.			
b Net investment income (if negative, enter -0-)		3,021,174.		
c Adjusted net income (if negative, enter -0-)			4,041,500.	

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF (2023)

Inc.

59-2592846

Page 2

Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only.</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	1,384,004.	1,075,052.	1,075,052.
	2 Savings and temporary cash investments	2,060,428.	2,788,177.	2,788,177.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable 179,782.			
	Less: allowance for doubtful accounts	176,013.	179,782.	179,782.
	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	217,260.	247,323.	247,323.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 8	89,619,942.	98,967,121.	98,967,121.
	c Investments - corporate bonds Stmt 9	46,754,415.	50,141,658.	50,141,658.
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other Stmt 10	775,028.	3,009,241.	3,009,241.	
14 Land, buildings, and equipment: basis 5,346,256.				
Less: accumulated depreciation 2,664,519.	3,167,738.	2,681,737.	2,681,737.	
15 Other assets (describe Statement 11)	2,366,889.	2,134,344.	2,134,344.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	146,521,717.	161,224,435.	161,224,435.	
Liabilities	17 Accounts payable and accrued expenses	724,487.	429,817.	
	18 Grants payable	799,441.	2,859,875.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe Statement 12)	1,674,307.	1,453,487.	
23 Total liabilities (add lines 17 through 22)	3,198,235.	4,743,179.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions	141,299,478.	155,078,206.	
	25 Net assets with donor restrictions	2,024,004.	1,403,050.	
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> 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	143,323,482.	156,481,256.		
30 Total liabilities and net assets/fund balances	146,521,717.	161,224,435.		

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	143,323,482.
2 Enter amount from Part I, line 27a	2	-5,192,867.
3 Other increases not included in line 2 (itemize) <u>Unrealized Gain on Investments</u>	3	18,350,641.
4 Add lines 1, 2, and 3	4	156,481,256.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	156,481,256.

Form 990-PF (2023)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF (2023)

Inc.

59-2592846

Page 3

Part IV Capital Gains and Losses for Tax on Investment Income See Attached Statement

(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	40,350,842.	40,315,958.	45,305.

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			45,305.

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	45,305.
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	-203,904.

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	41,994.
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	41,994.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	41,994.
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	208,486.
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	208,486.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	166,492.
11	Enter the amount of line 10 to be: Credited to 2024 estimated tax 166,492. Refunded	11	0.

Form 990-PF (2023)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF (2023)

Inc.

59-2592846

Page 4

Part VI-A Statements Regarding Activities

	Yes	No
1a 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 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 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d 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.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____ 0.		
2 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.		
3 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
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 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> .		
6 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
7 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	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. _____ FL		
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	
9 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 2023 or the tax year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X
11 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
12 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
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address <u>www.healthystpete.foundation</u>		
14 The books are in care of <u>Ricky Howell</u> Telephone no. <u>(727) 865-4650</u> Located at <u>2333 34th Street South, St. Petersburg, FL</u> ZIP+4 <u>33711</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year		N/A
16 At any time during calendar year 2023, 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 (2023)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF (2023)

Inc.

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
1a 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 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
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d 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 2023?	1d	X
2 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)):		
a At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	2a	X
If "Yes," list the years _____, _____, _____, _____		
b Are there any years listed in 2a for which the foundation is not 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 all years listed, answer "No" and attach statement - see instructions.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. _____, _____, _____, _____		
3a 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 If "Yes," did it have excess business holdings in 2023 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 2023.)	3b	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2023?	4b	X

Form 990-PF (2023)

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

	Yes	No
5a 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 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	
c Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
d 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 14	X	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
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
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A		
8 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 13		528,986.	49,730.	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
Marcus Brooks - 2333 34th Street South, St. Petersburg, FL 33711	Exec Director Ctr for Health Equity 40.00	152,999.	15,930.	0.
Julie Rocco - 2333 34th Street South, St. Petersburg, FL 33711	Director of Grants Mgmt & Adminisrtr 40.00	134,015.	18,197.	0.
Belinda Childs - 2333 34th Street South, St. Petersburg, FL 33711	Controller 40.00	120,909.	15,765.	0.
Lisa Brody - 2333 34th Street South, St. Petersburg, FL 33711	Chief Strategy Officer 40.00	120,237.	13,278.	0.
Lisa Yacso - 2333 34th Street South, St. Petersburg, FL 33711	Administration and Operations Manag 40.00	118,958.	11,309.	0.
Total number of other employees paid over \$50,000				10

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
Roundhouse Creative Inc. P.O. Box 15938, St. Petersburg, FL 33733	Communications Services	171,506.
The B.I.G. Security Group LLC - 4905 - 34th Street South#178, St. Petersburg, FL 33711	Security Services	135,222.
Tucker/Hall, Inc. 1308 E 7th Avenue, Tampa, FL 33605	Communications Services	132,465.
Trenam Law P.O. Box 1102, Tampa, FL 33601-1102	Legal Services	129,726.
Cvent, Inc. - 1765 Greensboro Station Place, Tysons Corner, VA 22102	Consulting and Software Services	120,025.
Total number of others receiving over \$50,000 for professional services		12

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
1 Center for Health Equity - See statement 17	2,122,300.
2 Strategic Initiatives - See statement 17	1,058,703.
3 Grants Management - See statement 17	834,574.
4	

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
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg
Inc.

Form 990-PF (2023)

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	144,234,877.
b	Average of monthly cash balances	1b	3,201,440.
c	Fair market value of all other assets (see instructions)	1c	91,058.
d	Total (add lines 1a, b, and c)	1d	147,527,375.
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	147,650.
3	Subtract line 2 from line 1d	3	147,379,725.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)	4	2,210,696.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3	5	145,169,029.
6	Minimum investment return. Enter 5% (0.05) of line 5	6	7,258,451.

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	7,258,451.
2a	Tax on investment income for 2023 from Part V, line 5	2a	41,994.
b	Income tax for 2023. (This does not include the tax from Part V.)	2b	
c	Add lines 2a and 2b	2c	41,994.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	7,216,457.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	7,216,457.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1	7	7,216,457.

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	6,282,895.
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	
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4	4	6,282,895.

Form 990-PF (2023)

Public Disclosure Copy

Foundation for a Healthy St. Petersburg
Inc.

Form 990-PF (2023)

59-2592846

Page 9

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				7,216,457.
2 Undistributed income, if any, as of the end of 2023:				
a Enter amount for 2022 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2023:				
a From 2018	1,162,467.			
b From 2019	7,324,075.			
c From 2020	3,800,276.			
d From 2021	1,030,078.			
e From 2022	143,103.			
f Total of lines 3a through e	13,459,999.			
4 Qualifying distributions for 2023 from Part XI, line 4: \$ 6,282,895.				
a Applied to 2022, but not more than line 2a ...			0.	
b Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2023 distributable amount				6,282,895.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2023 (If an amount appears in column (d), the same amount must be shown in column (a).)	933,562.			933,562.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	12,526,437.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c 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.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0.
7 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.			
8 Excess distributions carryover from 2018 not applied on line 5 or line 7	228,905.			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	12,297,532.			
10 Analysis of line 9:				
a Excess from 2019 ...	7,324,075.			
b Excess from 2020 ...	3,800,276.			
c Excess from 2021 ...	1,030,078.			
d Excess from 2022 ...	143,103.			
e Excess from 2023 ...				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF (2023)

Inc.

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 2023, 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) 2023	(b) 2022	(c) 2021	(d) 2020	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed _____					
b 85% (0.85) of line 2a _____					
c Qualifying distributions from Part XI, line 4, for each year listed _____					
d Amounts included in line 2c not used directly for active conduct of exempt activities _____					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c _____					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets _____					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) _____					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed _____					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) _____					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) _____					
(3) Largest amount of support from an exempt organization _____					
(4) 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 15 _____

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 (2023)

59-2592846

Page 11

Part XIV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
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)				
a <i>Paid during the year</i>				
Total See continuation sheet(s)			3a	1,028,026.
b <i>Approved for future payment</i>				
Total See continuation sheet(s)			3b	2,812,500.

Form 990-PF (2023)

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 8618		01/01/23	06/30/23
c Goldman Sachs 8618		01/01/21	01/01/23
d Goldman Sachs 0887		01/01/23	06/30/23
e Goldman Sachs 0887		01/01/21	01/01/23
f Goldman Sachs 0895	P	01/01/23	06/30/23
g Goldman Sachs 0895		01/01/21	01/01/23
h Goldman Sachs 1232		01/01/23	06/30/23
i Goldman Sachs 1232	P	01/01/21	01/01/23
j Goldman Sachs 1323		01/01/23	06/30/23
k Goldman Sachs 1323		01/01/21	01/01/23
l Goldman Sachs 0911		01/01/23	06/30/23
m Goldman Sachs 0911	P	01/01/21	01/01/23
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			10,421.
b 1,667,841.		1,690,803.	-22,962.
c 2,733,511.		2,647,790.	85,721.
d 917,957.		996,096.	-78,139.
e 1,519,649.		1,822,337.	-302,688.
f 4,109,843.		3,903,709.	206,134.
g 574,502.		543,557.	30,945.
h 1,254,617.		1,233,794.	20,823.
i 689,743.		608,582.	81,161.
j 2,242,468.		2,383,708.	-141,240.
k 1,243,923.		976,722.	267,201.
l 16,422,920.		16,611,440.	-188,520.
m 6,973,868.		6,897,420.	76,448.
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			10,421.
b			** -22,962.
c			85,721.
d			** -78,139.
e			-302,688.
f			** 206,134.
g			30,945.
h			** 20,823.
i			81,161.
j			** -141,240.
k			267,201.
l			** -188,520.
m			76,448.
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	45,305.
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	-203,904.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
Advantage Village Academy Inc. 833 22nd Street South St Petersburg, FL 33712		501(c)3 Public Charity	General operating support	15,000.
Bay Area Legal Services, Inc. 4948 Central Avenue St. Petersburg, FL 33707		501(c)3 Public Charity	Measuring and addressing pandemic impact on marginalized communities in regards to accessing legal services through client community listening and subsequent fellowship.	80,000.
Community Foundation of Tampa Bay, Inc. 4300 W. Cypress Street 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.	67,500.
Council on Foundations 1255 23rd St, NW, Suite 200 Washington, DC 20037		501(c)3 Public Charity	General operating support for Council on Foundations	10,000.
Dr. Carter G Woodson African American Museum, Inc. 2240 9th Ave S St. Petersburg, FL 33712		501(c)3 Public Charity	In support of the three-to-five-year, \$26.5 million capital campaign to build, open and endow a new 33,500 square foot building on five acres of land on 22nd Street in St. Petersburg.	47,500.
Florida Philanthropic Network 12157 W. Linebaugh Ave. Tampa, FL 33626		501(c)3 Public Charity	General operating support for the Florida Philanthropic Network to enhance philanthropic practices in the local region.	25,000.
Florida Philanthropic Network 12157 W. Linebaugh Ave. Tampa, FL 33626		501(c)3 Public Charity	general operating support	8,000.
Total from continuation sheets				1,028,026.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
Grantmakers for Effective Organizations 1310 L Street NW Washington, DC 20005		501(c)3 Public Charity	General operating support	2,500.
Grantmakers in Health 1100 Connecticut Avenue, NW Suite 1100 Washington DC, DC 20036		501(c)3 Public Charity	General operating support	13,900.
In Touch With Communities Around the World, Inc. DBA Arts Conservatory for 8626 Miramar Trrace 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.	1,500.
League of Women Voters of the St. Petersburg Area, Inc. 2335 22nd Ave. S. St. Petersburg, FL 33712		501(c)4 Civic League and Socia	To accelerate race equity via implementation of an equitable community-based food system supported by the St. Pete Food Policy Council.	-34,210.
PEAK Grantmaking 1701 Pennsylvania Ave NW Washington, DC 20006		501(c)3 Public Charity	General operating support	1,500.
Philanthropy Southeast (previously Southeastern Council of Foundations) 100 Peachtree Street Atlanta, GA 30303		501(c)3 Public Charity	To provide general operating support for Philanthropy Southeast to enhance philanthropic practices.	9,270.
Pinellas Community Foundation 17755 US Hwy 19 N Ste 150 Clearwater, FL 33764		501(c)3 Public Charity	General operating grant	10,000.
Total from continuation sheets				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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 influence systems change by addressing environmental justice and improvements to natural and built environment in the Childs Park Neighborhood via the engagement of community environmental champions including residents and businesses.	8,250.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	FHSP and PEF embarked on 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.	237,500.
Pinellas Opportunity Council, Inc 501 1st Avenue N St. Petersburg, FL 33701		501(c)3 Public Charity	To support black male affinity to elevate their influence in systems change, locally.	50,000.
Stetson University 1401 61st Street South Gulfport, FL 33707		501(c)3 Public Charity	Accelerate racial equity via civic awareness and engagement of BIPOC (Black, Indigenous, or a Person of Color) youth.	1,316.
Suncoast Center, Inc. PO Box 10970 St. Petersburg, FL 33711		501(c)3 Public Charity	Continuation of the Wellness Connection initiative that supports behavioral health in Pinellas County.	58,250.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	Have Supportive Equity Connections contract with grant writers as well as identify capacity-building needs of organizations that FHSP may be able to offer additional supports to in 2023.	2,500.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To support a just and prosperous economy via capacity building for BIPOC businesses.	26,250.

Total from continuation sheets

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To support economic equity and justice via the promotion of the significance of Juneteenth and local efforts to acknowledge and celebrate it.	15,000.
Tampa Bay Network to End Hunger, Inc. 4532 W. Kennedy Blvd., Suite 252 Tampa, FL 33609		501(c)3 Public Charity	To support St Pete Food Policy Council in their efforts to create an equitable community-based food system.	5,750.
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.	142,500.
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 influence systems change via support for planning efforts that will explore and implement a Truth, Racial Healing, and Transformation Campus Center comprised of a consortium of four local higher education institutions.	2,500.
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.	2,000.
University of South Florida Research Foundation, Inc. 3802 Spectrum Blvd, Suite 100 Tampa, FL 33612		501(c)3 Public Charity	To address BIPOC mental health and well being via race equity evaluation of the Community Assistance and Life Liaison (CALL).	47,500.
Total from continuation sheets				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
A Healthy Dose Foundation, Inc. 6812 22nd Avenue North St. Petersburg, FL 33710			To support Mental Health and Wellness for BIPOC capacity-building via educational training of pharmacists and student pharmacists and the deployment of pharmacy-led services in the BIPOC community.	10,000.
Cultivate the Creative 193 38th Ave SE St. Petersburg, FL 33705		501(c)3 Public Charity	To support Economic Equity and Justice capacity-building via the enhancement of a mentorship program.	10,000.
Cultivate the Creative 193 38th Ave SE St. Petersburg, FL 33705		501(c)3 Public Charity	To support Mental Health and Wellness for BIPOC capacity-building via the creation of an expressive arts therapy program.	10,000.
Dr. Carter G Woodson African American Museum, Inc. 2240 9th Ave S St. Petersburg, FL 33712		501(c)3 Public Charity	To support the capacity of the organization to lead a capital campaign to build, open, and endow The Woodson African American Museum of Florida located in St Petersburg, Florida.	100,000.
Empowered Parents 1600 14th St. N. St. Petersburg, FL 33704			To support Mental Health and Wellness for BIPOC capacity-building via the creation of curriculum that will support active parental engagement of fathers.	10,000.
Golden Generations Inc. 2920 Pallanza Dr. South St Petersburg, FL 33705		501(c)3 Public Charity	To support Economic Equity and Justice via the expansion of wrap-around services that support young adults transitioning out of foster care.	250,000.
Healthy Start Coalition of Pinellas, Inc. 4000 Gateway Centre Blvd. Pinellas Park, FL 33782		501(c)3 Public Charity	To support Economic Equity and Justice via the creation of a Doula Network in Pinellas County.	500,000.
Total from continuation sheets				2,812,500.

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
James B Sanderlin Family Service Center Inc. 2335 22nd Ave South St Petersburg, FL 33712		501(c)3 Public Charity	To support Mental Health and Wellness for BIPOC youth and families via the implementation of early education and literacy VPK classrooms and wraparound services for families.	82,499.
Mind the Gap Together 4810 12th Avenue South St Petersburg, FL 33711			To support Mental Health and Wellness for BIPOC capacity-building via enhancement of additional programmatic supports.	10,000.
One Community Grocery Co-op 2420 13TH ST. SO St. Petersburg, FL 33705			To support Economic Equity and Justice capacity-building via the inclusion of innovative outreach strategies that support increased membership.	10,000.
Pinellas County Urban League, Inc. 333 31st Street North St. Petersburg, FL 33713		501(c)3 Public Charity	To support Economic Equity and Justice via the expansion of the Equity Focused Entrepreneurial Ecosystem (E3) that provides business navigation, convenings, and broad-based learning.	500,000.
Pinellas Education Foundation 12090 Starkey Road Largo, FL 33773		501(c)3 Public Charity	FHSP and PEF embarked on 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.	12,500.
SailFuture 2900 68th Ave. S St. Petersburg, FL 33712		501(c)3 Public Charity	To support Economic Equity and Justice via the expansion of education and career pathway programs for young adults served in a nontraditional educational ecosystem.	250,000.
Seniors in Service of Tampa Bay, Inc. 1306 W Sligh Ave Tampa, FL 33604		501(c)3 Public Charity	To support Mental Health and Wellness for BIPOC via the expansion of the Foster Grandparents program serving K-5 grade youth who are struggling at school.	249,524.
Total from continuation sheets				

Public Disclosure Copy

Foundation for a Healthy St. Petersburg

Form 990-PF

Inc.

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
She Wins Totally Inc 2154 9th Avenue S St. Petersburg, FL 33712			To support Economic Equity and Justice capacity-building to expand programming for BIPOC women experiencing financial hardship due to interactions with the criminal justice system.	10,000.
Sickle Cell Disease Association of America St Petersburg Chapter, Inc. 1344 22nd Street South St Petersburg, FL 33712		501(c)3 Public Charity	To support Mental Health and Wellness for BIPOC via the expansion of Sickle Cell disease outreach and education.	60,000.
Speakeasy Media Foundation 2335 - 22nd Ave South Suite 16 &17 St. Petersburg, FL 33712		501(c)3 Public Charity	To support Mental Health and Wellness for BIPOC via the expansion of meditation, yoga, and other mental health activities into schools and neighborhood centers.	112,303.
St. Anthony's Hospital 1200 7th Avenue N St. Petersburg, FL 33705		501(c)3 Public Charity	To support deepening the impact of culturally responsive initiatives with an emphasis on racial equity to achieve health equity.	50,000.
Supportive Equity Connections of Tampa Bay 1601 16th Street South St. Petersburg, FL 33705		501(c)3 Public Charity	To support Economic Equity and Justice via access for South St. Pete vendors to operate in a retail business incubator space.	250,000.
The Modern Griot Corporation 4905 34th St S St. Petersburg, FL 33711		501(c)3 Public Charity	To support Economic Equity and Justice capacity-building via expansion of financial literacy for youth entrepreneurs and their parents.	10,000.
The Rise and Thrive Foundation 2310 18th Ave S St.Petersburg, FL 33712			To support Economic Equity and Justice capacity-building via development of financial literacy training materials for youth and parents.	10,000.
Total from continuation sheets				

Form **2220**
Department of the Treasury
Internal Revenue Service

Underpayment of Estimated Tax by Corporations

OMB No. 1545-0123

Attach to the corporation's tax return. Form 990-PF

2023

Go to www.irs.gov/Form2220 for instructions and the latest information.

Name Foundation for a Healthy St. Petersburg Inc.	Employer identification number 59-2592846
---	--

Note: Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38, on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

Part I Required Annual Payment

1 Total tax (see instructions)		1	41,994.
2a Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1	2a		
b Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method	2b		
c Credit for federal tax paid on fuels (see instructions)	2c		
d Total. Add lines 2a through 2c	2d		
3 Subtract line 2d from line 1. If the result is less than \$500, do not complete or file this form. The corporation does not owe the penalty	3		41,994.
4 Enter the tax shown on the corporation's 2022 income tax return. See instructions. Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5	4		312,652.
5 Required annual payment. Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3	5		41,994.

Part II Reasons for Filing - Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty. See instructions.

- 6 The corporation is using the adjusted seasonal installment method.
- 7 The corporation is using the annualized income installment method.
- 8 The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

Part III Figuring the Underpayment

	(a)	(b)	(c)	(d)	
9 Installment due dates. Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year	9	05/15/23	06/15/23	09/15/23	12/15/23
10 Required installments. If the box on line 6 and/or line 7 above is checked, enter the amounts from Sch A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column	10	10,499.	10,498.	10,499.	10,498.
11 Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions	11	208,486.			
Complete lines 12 through 18 of one column before going to the next column.					
12 Enter amount, if any, from line 18 of the preceding column	12		197,987.	187,489.	176,990.
13 Add lines 11 and 12	13		197,987.	187,489.	176,990.
14 Add amounts on lines 16 and 17 of the preceding column	14				
15 Subtract line 14 from line 13. If zero or less, enter -0-	15	208,486.	197,987.	187,489.	176,990.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16		0.	0.	
17 Underpayment. If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18	17				
18 Overpayment. If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column	18	197,987.	187,489.	176,990.	

Go to Part IV on page 2 to figure the penalty. Do not go to Part IV if there are no entries on line 17 - no penalty is owed.

For Paperwork Reduction Act Notice, see separate instructions.

Form 2220 (2023)

Public Disclosure Copy

Part IV Figuring the Penalty

	(a)	(b)	(c)	(d)
19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. (C corporations with tax years ending June 30 and S corporations: Use 3rd month instead of 4th month. Form 990-PF and Form 990-T filers: Use 5th month instead of 4th month.) See instructions	19			
20 Number of days from due date of installment on line 9 to the date shown on line 19	20			
21 Number of days on line 20 after 4/15/2023 and before 7/1/2023	21			
22 Underpayment on line 17 x $\frac{\text{Number of days on line 21} \times 7\% (0.07)}{365}$...	22 \$	\$	\$	\$
23 Number of days on line 20 after 6/30/2023 and before 10/1/2023	23			
24 Underpayment on line 17 x $\frac{\text{Number of days on line 23} \times 7\% (0.07)}{365}$...	24 \$	\$	\$	\$
25 Number of days on line 20 after 9/30/2023 and before 1/1/2024	25			
26 Underpayment on line 17 x $\frac{\text{Number of days on line 25} \times 8\% (0.08)}{365}$...	26 \$	\$	\$	\$
27 Number of days on line 20 after 12/31/2023 and before 4/1/2024	27			
28 Underpayment on line 17 x $\frac{\text{Number of days on line 27} \times 8\% (0.08)}{366}$...	28 \$	\$	\$	\$
29 Number of days on line 20 after 3/31/2024 and before 7/1/2024	29			
30 Underpayment on line 17 x $\frac{\text{Number of days on line 29} \times \%}{366}$	30 \$	\$	\$	\$
31 Number of days on line 20 after 6/30/2024 and before 10/1/2024	31			
32 Underpayment on line 17 x $\frac{\text{Number of days on line 31} \times \%}{366}$	32 \$	\$	\$	\$
33 Number of days on line 20 after 9/30/2024 and before 1/1/2025	33			
34 Underpayment on line 17 x $\frac{\text{Number of days on line 33} \times \%}{366}$	34 \$	\$	\$	\$
35 Number of days on line 20 after 12/31/2024 and before 3/16/2025	35			
36 Underpayment on line 17 x $\frac{\text{Number of days on line 35} \times \%}{365}$	36 \$	\$	\$	\$
37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37 \$	\$	\$	\$
38 Penalty. Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 34; or the comparable line for other income tax returns	38 \$			0.

* Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at www.irs.gov. You can also call 800-829-4933 to get interest rate information.

Form 990-PF Dividends and Interest from Securities Statement 1

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Goldman Sachs Regions	3,959,875. 0.	0. 0.	3,959,875. 0.	4,009,853. 24,245.	4,009,853. 24,245.
To Part I, line 4	3,959,875.	0.	3,959,875.	4,034,098.	4,034,098.

Form 990-PF Other Income Statement 2

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Gain from discontinued operations	7,402.	0.	7,402.
Total to Form 990-PF, Part I, line 11	7,402.	0.	7,402.

Form 990-PF Legal Fees Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal Fees	124,906.	0.	0.	124,906.
To Fm 990-PF, Pg 1, ln 16a	124,906.	0.	0.	124,906.

Form 990-PF Accounting Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting Fees	46,255.	4,625.	0.	41,630.
To Form 990-PF, Pg 1, ln 16b	46,255.	4,625.	0.	41,630.

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	1,017,310.	65,132.	0.	952,178.
Investment Management Investment Expenses - Sparkplug Portfolio Investments	535,045. 0.	552,399. 1,549.	0. 0.	0. 0.
To Form 990-PF, Pg 1, ln 16c	1,552,355.	619,080.	0.	952,178.

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	33,311.	0.	0.	0.
Foreign Taxes from Investments	0.	68,207.	0.	0.
To Form 990-PF, Pg 1, ln 18	33,311.	68,207.	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
Technology	371,374.	15,521.	0.	355,854.
Direct Community Investment Marketing and Communications Other Administrative Expenses	363,300. 280,751. 123,438.	3,700. 0. 12,115.	0. 0. 0.	359,600. 280,751. 111,323.
Office Operations	55,275.	4,148.	0.	51,128.
To Form 990-PF, Pg 1, ln 23	1,194,138.	35,484.	0.	1,158,656.

Form 990-PF

Corporate Stock

Statement 8

Description	Book Value	Fair Market Value
Aperio: Custom (S&P 500)	61,226,090.	61,226,090.
Aperio: Custom (MSCI EAFE)	12,437,159.	12,437,159.
FTSE Developed All Cap EX US Index Fund (Vanguard)	6,089,239.	6,089,239.
William Blair: Non-US Equity (SMA)	6,082,522.	6,082,522.
Nuveen: Small Cap Value	5,194,040.	5,194,040.
Granite: Small/Mid Cap Core	4,984,489.	4,984,489.
RBC Emerging Markets Equity Fund	2,953,582.	2,953,582.
Total to Form 990-PF, Part II, line 10b	98,967,121.	98,967,121.

Form 990-PF

Corporate Bonds

Statement 9

Description	Book Value	Fair Market Value
Ishares Short-term Corporate Bond	20,143,589.	20,143,589.
TIAA-CREF Core Impact Bond Fund	13,959,106.	13,959,106.
Eaton Vance Income Fund of Boston	7,976,622.	7,976,622.
Federated Hermes High Yield Bond Fund	7,991,797.	7,991,797.
TCW Met West Unconstrained Bond Fund	39,057.	39,057.
Aristotle Floating Rate Income Fund	31,487.	31,487.
Total to Form 990-PF, Part II, line 10c	50,141,658.	50,141,658.

Form 990-PF

Other Investments

Statement 10

Description	Valuation Method	Book Value	Fair Market Value
Private Credit Managers IV Offshore LP	FMV	2,204,715.	2,204,715.
Vintage IX B Offshore SCSP	FMV	672,006.	672,006.
Certificate of Deposit	COST	100,000.	100,000.
Black Equity Opportunities Offshore SCSP/E&F Priv Eq Mgr 2022 2023 Offshore	FMV	32,520.	32,520.
Total to Form 990-PF, Part II, line 13		3,009,241.	3,009,241.

Foundation for a Healthy St. Petersburg

59-2592846

Form 990-PF

Other Assets

Statement 11

Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Right to Use Asset - Operating Lease	1,365,035.	1,161,700.	1,161,700.
Recoverable Grant Receivable - Loan Funds	682,975.	662,413.	662,413.
Income Tax Refunds and Credits Receivable (net)	200,000.	163,161.	163,161.
Investment in Spark Plug	100,000.	100,000.	100,000.
Security Deposit	18,077.	18,077.	18,077.
Other Receivable	802.	28,993.	28,993.
To Form 990-PF, Part II, line 15	2,366,889.	2,134,344.	2,134,344.

Form 990-PF

Other Liabilities

Statement 12

Description	BOY Amount	EOY Amount
Lease Liability	1,521,737.	1,305,837.
Professional/General Claims	152,570.	147,650.
Total to Form 990-PF, Part II, line 22	1,674,307.	1,453,487.

Form 990-PF

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

Statement 13

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	Expense Account
Bridgette P. Heller 2333 34th Street South St. Petersburg, FL 33711	Secretary - Beg. 7/1/23 1.00	0.	0.	0.
Shameka Jones 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Joe Lugo 2333 34th Street South St. Petersburg, FL 33711	Trustee 1.00	0.	0.	0.
Dr. Kanika Tomalin 2333 34th Street South St. Petersburg, FL 33711	President/CEO 50.00	146,833.	10,417.	0.
Carl Lavender 2333 34th Street South St. Petersburg, FL 33711	VP and Interim Co-CEO 50.00	150,953.	10,046.	0.
Carol Martin Brown 2333 34th Street South St. Petersburg, FL 33711	Chief Financial and Admin. Officer 50.00	231,200.	29,267.	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.

Foundation for a Healthy St. Petersburg

59-2592846

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 - End 6/30/23 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

528,986.	49,730.	0.
----------	---------	----

Form 990-PF

Expenditure Responsibility Statement
Part VI-B, Line 5d

Statement 14

Grantee's Name

Times Publishing Company

Grantee's Address

490 1st Ave S
St. Petersburg, FL 33701

<u>Grant Amount</u>	<u>Date of Grant</u>	<u>Amount Expended</u>	<u>Verification Date</u>
76,250.	12/14/22	76,250.	02/24/23

Purpose of Grant

To accelerate racial equity via support of local journalism efforts that are focused on race and systemic racism.

Dates of Reports by Grantee

02/24/23

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 15

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 2023, the Foundation used a Request for Proposal (RFP) process whereby grant applications were 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.

In 2024, the Foundation continued to use a Request for Proposal (RFP) process whereby grant applications will be accepted within a specified timeframe and completed by applicants using an online grants portal. Similar to 2023, a limited number of grant awards may be issued during the year outside of the Foundation's RFP process.

Any Submission Deadlines

In 2023 and 2024, deadlines vary according to grant type.

Restrictions and Limitations on Awards

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

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:

- Dr. Kanika Tomalin, President & CEO
- Carol Martin Brown, Chief Financial and Administrative Officer
- Carl Lavender, VP and Interim Co-CEO

Form/Line Identifier and Description/Return Reference

Part VIII-A - Summary of Direct Charitable Activities

Explanation:

1 - Center for Health Equity \$2,122,300

The Foundation seeks to magnify impact in achieving its mission through its Center for Health Equity. The Center is a 24,500-square-foot public-facing facility that fosters an environment where people can learn, connect, and create in order to advance health and racial equity. The health of our community from our individual wellness to the strength and resiliency of our city is deeply dependent on a complex compound of systems that span sectors and communities. Embedded within many of these systems are marginalizing policies and practices that bear an inordinate burden of oppression on people of color. Disparate outcomes, borne of inequities in the social determinants that shape them, too often result. A healthier, more equitable future requires the convening of people with diverse lived experiences, backgrounds and perspectives. This must be done in a way that provides the space, support, and resources to foster intentional equity, collaboration and the inclusive shaping of shared goals that re-engineer the systems that guide our lives.

2 - Strategic Initiatives \$1,058,703

Through its strategic initiatives, the Foundation leads, scales, and supports cross-sector work designed to change systems through collaboration. This involves identifying gaps and opportunities, leveraging relationships to maximize impact, and providing structure and resources to support multi-sector partnerships. Informed by deep community listening and research, this work complements the Foundation's 2023 and 2024 priority focus areas of Economic Equity and Justice and Mental Health and Wellness for Black, Indigenous, people of color.

3 - Grants Management \$834,574

The Foundation is one of the largest private-sector funders in St. Petersburg that supports community-driven work to advance health and racial equity. In 2023, the Foundation awarded funds to local organizations to support initiatives that focus on Economic Equity and Justice and Mental Health and Wellness for Black, Indigenous people of color in the St. Petersburg community. All funded work targets the three zip codes of the South St. Petersburg Community Redevelopment Area (33705, 33711, 33712), and falls under the categories of capacity building, professional development/training, programmatic operations, and multi-sector collaboration.