

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**

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

2023

Open to Public Inspection

A For the 2023 calendar year, or tax year beginning and ending

B Check if applicable: Address change Name change Initial return Final return/terminated Amended return Application pending	C Name of organization CHARLOTTE COMMUNITY FOUNDATION INC		D Employer identification number 65-0455319
	Doing business as		E Telephone number (941) 637-0077
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	227 SULLIVAN STREET		G Gross receipts \$ 9,007,766.
City or town, state or province, country, and ZIP or foreign postal code PUNTA GORDA, FL 33950			
F Name and address of principal officer: SHELLEY STRICKLAND, PHD SAME AS C ABOVE			H(a) Is this a group return for subordinates? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527			H(b) Are all subordinates included? Yes <input type="checkbox"/> No <input type="checkbox"/>
J Website: WWW.CHARLOTTECF.ORG			H(c) Group exemption number
K Form of organization: <input checked="" type="checkbox"/> Corporation Trust Association Other			L Year of formation: 1993 M State of legal domicile: FL

Part I Summary		Prior Year	Current Year
Activities & Governance	1 Briefly describe the organization's mission or most significant activities: AS THE COMMUNITY FOUNDATION DEDICATED TO CHARLOTTE COUNTY, FL, THE CHARLOTTE COMMUNITY		
	2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	7
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	7
	5 Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	9
	6 Total number of volunteers (estimate if necessary)	6	39
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	2,840,724.	8,088,415.
	9 Program service revenue (Part VIII, line 2g)	0.	0.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	252,379.	462,039.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	22,692.	21,413.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,115,795.	8,571,867.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	2,351,637.	2,467,912.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	454,088.	446,786.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25)	66,436.	
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	437,300.	601,307.
18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	3,243,025.	3,516,005.	
19 Revenue less expenses. Subtract line 18 from line 12	-127,230.	5,055,862.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 16,734,505.	End of Year 23,581,420.
	21 Total liabilities (Part X, line 26)	1,592,900.	1,748,157.
	22 Net assets or fund balances. Subtract line 21 from line 20	15,141,605.	21,833,263.

Part II Signature Block

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

Sign Here	Signature of officer KIM SAVASUK, CPA, TREASURER	Date
Paid Preparer Use Only	Print/Type preparer's name REBECCA U. STONER	Preparer's signature
	Firm's name KERKERING, BARBERIO & CO.	Date
	Firm's address P.O. BOX 49348 SARASOTA, FL 34230-6348	Check if self-employed <input type="checkbox"/>
		PTIN P00585910
		Firm's EIN 59-1753337
		Phone no. 941-365-4617

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

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: TO FOSTER PHILANTHROPY ACROSS CHARLOTTE COUNTY TO ENHANCE OUR COMMUNITY FOR GENERATIONS.

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

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code:) (Expenses \$ 2,981,548. including grants of \$ 2,467,912.) (Revenue \$) AS A FACILITATOR OF PHILANTHROPY, CCF:

- (1) PROVIDES FUNDING FOR CHARITABLE ORGANIZATIONS: \$2,140,564 TO 58 DIFFERENT NONPROFIT ORGANIZATIONS IN 2023.
(2) CCF ALSO ADMINISTERS SCHOLARSHIPS FOR BOTH TRADITIONAL-AGE AND ADULT LEARNERS: \$166,800 AWARDED IN 2023.
(3) CCF ALSO PROVIDES USAGE OF ITS FACILITIES FOR NONPROFIT EDUCATION AND TRAINING BY VARIOUS LOCAL 501(C)(3) OR GOVERNMENT AGENCIES WITH PUBLIC-PRIVATE PARTNERSHIPS.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 2,981,548.

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include questions 1 through 21 regarding organizational requirements and disclosures.

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question, Yes, No. Rows 22-38 covering various IRS requirements like grants, compensation, tax-exempt bonds, and controlled entities.

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

Table with 3 columns: Question, Yes, No. Rows 1a-1c regarding Form 1096, Forms W-2G, and backup withholding rules.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with columns for question number, question text, and Yes/No response boxes. Includes questions 2a through 17 regarding employee reporting, tax returns, unrelated business income, foreign accounts, prohibited transactions, and charitable contributions.

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

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

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
1b	Enter the number of voting members included on line 1a, above, who are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
7b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8a	The governing body?	X	
8b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

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

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

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed FL
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records
SUZANNE HERRON - (941) 637-0077
227 SULLIVAN STREET, PUNTA GORDA, FL 33950

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
 - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
 - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
 - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) SUZANNE HERRON CFO/INTERIM CO-EXEC. DIR.	40.00			X			90,180.	0.	6,722.	
(2) JUSTIN BRAND CDO/INTERIM CO-EXEC. DIR.	40.00			X			56,417.	0.	7,729.	
(3) ASHLEY MAHER EXECUTIVE DIRECTOR THRU JUNE 30	40.00			X			53,676.	0.	6,196.	
(4) LAURA AMENDOLA DIRECTOR	2.00	X					0.	0.	0.	
(5) ROGER EATON DIRECTOR	2.00	X					0.	0.	0.	
(6) REPPARD GORDON DIRECTOR	2.00	X					0.	0.	0.	
(7) LUCIENNE PEARS DIRECTOR	2.00	X					0.	0.	0.	
(8) LEW BENNETT IMM. PAST CHAIR	2.00	X					0.	0.	0.	
(9) KIM SAVASUK CHAIR	5.00	X		X			0.	0.	0.	
(10) JILL MCRORY TREASURER	5.00	X		X			0.	0.	0.	
(11) ROBERT PETERSON SECRTY JAN-MAR; VP/SECRTY SEPT-DEC	5.00	X		X			0.	0.	0.	
(12) CRAIG EASTERLY SECRETARY APRIL-JUNE	5.00	X		X			0.	0.	0.	
(13) SARAH DESROSIERS SECRETARY JULY-AUG; DIRECTOR	5.00	X		X			0.	0.	0.	

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Subtotal							200,273.	0.	20,647.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							200,273.	0.	20,647.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 0

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

Part VIII Statement of Revenue

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

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above	1f 8,088,415.					
	g Noncash contributions included in lines 1a-1f	1g \$ 31,476.					
	h Total. Add lines 1a-1f		8,088,415.				
Program Service Revenue	2 a	Business Code					
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f						
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		472,704.			472,704.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross rents	6a	(i) Real	15,000.			
			(ii) Personal				
	b Less: rental expenses	6b	13,750.				
	c Rental income or (loss)	6c	1,250.				
	d Net rental income or (loss)		1,250.			1,250.	
	7 a Gross amount from sales of assets other than inventory	7a	(i) Securities	411,484.			
			(ii) Other				
	b Less: cost or other basis and sales expenses	7b	422,149.				
c Gain or (loss)	7c	-10,665.					
d Net gain or (loss)		-10,665.			-10,665.		
8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a						
b Less: direct expenses	8b						
c Net income or (loss) from fundraising events							
9 a Gross income from gaming activities. See Part IV, line 19	9a						
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11 a OTHER INCOME	Business Code 624200	20,163.			20,163.	
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d		20,163.				
12 Total revenue. See instructions		8,571,867.	0.	0.	483,452.		

Part IX Statement of Functional Expenses

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

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

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,301,112.	2,301,112.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	166,800.	166,800.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	220,919.	115,883.	87,789.	17,247.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	171,068.	88,978.	71,614.	10,476.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	4,268.	2,224.	1,790.	254.
9 Other employee benefits	19,473.	9,094.	9,255.	1,124.
10 Payroll taxes	31,058.	16,150.	12,734.	2,174.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	28,199.	14,664.	11,561.	1,974.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	51,879.		51,879.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	47,344.	24,618.	19,412.	3,314.
12 Advertising and promotion	182,384.	94,839.	74,777.	12,768.
13 Office expenses	98,718.	46,940.	45,394.	6,384.
14 Information technology	44,255.	23,009.	18,142.	3,104.
15 Royalties				
16 Occupancy	39,275.	20,424.	16,103.	2,748.
17 Travel	8,013.	4,167.	3,285.	561.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	39,689.	20,639.	19,050.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	61,551.	32,007.	25,236.	4,308.
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a _____				
b _____				
c _____				
d _____				
e All other expenses _____				
25 Total functional expenses. Add lines 1 through 24e	3,516,005.	2,981,548.	468,021.	66,436.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

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

		(A)		(B)	
		Beginning of year		End of year	
Assets	1 Cash - non-interest-bearing		1,316.	1	4,152.
	2 Savings and temporary cash investments		2,337,349.	2	7,290,542.
	3 Pledges and grants receivable, net		1,047,637.	3	961,767.
	4 Accounts receivable, net			4	
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6	
	7 Notes and loans receivable, net			7	
	8 Inventories for sale or use			8	
	9 Prepaid expenses and deferred charges		57,855.	9	15,387.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	2,530,107.		
	b Less: accumulated depreciation	10b	605,905.		
	11 Investments - publicly traded securities		1,968,326.	10c	1,924,202.
	12 Investments - other securities. See Part IV, line 11		10,652,785.	11	12,699,680.
	13 Investments - program-related. See Part IV, line 11			12	
	14 Intangible assets			13	
	15 Other assets. See Part IV, line 11		669,237.	14	
16 Total assets. Add lines 1 through 15 (must equal line 33)		16,734,505.	15	685,690.	
			16	23,581,420.	
Liabilities	17 Accounts payable and accrued expenses		15,600.	17	31,764.
	18 Grants payable		81,852.	18	207,518.
	19 Deferred revenue			19	
	20 Tax-exempt bond liabilities			20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22	
	23 Secured mortgages and notes payable to unrelated third parties			23	
	24 Unsecured notes and loans payable to unrelated third parties			24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		1,495,448.	25	1,508,875.
	26 Total liabilities. Add lines 17 through 25		1,592,900.	26	1,748,157.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/>				
	and complete lines 27, 28, 32, and 33.				
	27 Net assets without donor restrictions		5,146,787.	27	4,524,131.
	28 Net assets with donor restrictions		9,994,818.	28	17,309,132.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/>				
	and complete lines 29 through 33.				
	29 Capital stock or trust principal, or current funds			29	
	30 Paid-in or capital surplus, or land, building, or equipment fund			30	
	31 Retained earnings, endowment, accumulated income, or other funds			31	
32 Total net assets or fund balances		15,141,605.	32	21,833,263.	
33 Total liabilities and net assets/fund balances		16,734,505.	33	23,581,420.	

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	8,571,867.
2	Total expenses (must equal Part IX, column (A), line 25)	2	3,516,005.
3	Revenue less expenses. Subtract line 2 from line 1	3	5,055,862.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	15,141,605.
5	Net unrealized gains (losses) on investments	5	1,551,194.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	84,602.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	21,833,263.

Part XII Financial Statements and Reporting

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

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

Form 990 (2023)

For Public Disclosure

**SCHEDULE A
(Form 990)**

Department of the Treasury
Internal Revenue Service

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

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization **CHARLOTTE COMMUNITY FOUNDATION INC** Employer identification number **65-045319**

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

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

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

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	923,185.	2,408,508.	1,157,906.	2,840,724.	8,088,415.	15,418,738.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	923,185.	2,408,508.	1,157,906.	2,840,724.	8,088,415.	15,418,738.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						6,541,244.
6 Public support. Subtract line 5 from line 4.						8,877,494.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4	923,185.	2,408,508.	1,157,906.	2,840,724.	8,088,415.	15,418,738.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	328,558.	336,059.	402,449.	275,730.	487,704.	1,830,500.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	6,705.	14,004.	22,735.	21,905.	20,163.	85,512.
11 Total support. Add lines 7 through 10						17,334,750.
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	51.21 %
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	64.72 %
16a 33 1/3% support test - 2023. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input checked="" type="checkbox"/>
b 33 1/3% support test - 2022. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2022. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2022 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2022 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

Table with 3 columns: Question, Yes, No. Row 11: Has the organization accepted a gift or contribution from any of the following persons? Sub-rows 11a, 11b, 11c.

Section B. Type I Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? Row 2: Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization?

Section C. Type II Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)?

Section D. All Type III Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? Row 2: Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? Row 3: By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year?

Section E. Type III Functionally Integrated Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions). Sub-rows a, b, c. Row 2: Activities Test. Answer lines 2a and 2b below. Sub-rows a, b. Row 3: Parent of Supported Organizations. Answer lines 3a and 3b below. Sub-rows a, b.

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

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

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

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

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

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

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2023 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
1	Distributable amount for 2023 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2023 (reasonable cause required - explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2023		
a	From 2018		
b	From 2019		
c	From 2020		
d	From 2021		
e	From 2022		
f	Total of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2023 distributable amount		
i	Carryover from 2018 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2023 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2023 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.		
6	Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.		
7	Excess distributions carryover to 2024. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2019		
b	Excess from 2020		
c	Excess from 2021		
d	Excess from 2022		
e	Excess from 2023		

Part VI

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

SCHEDULE A, LIST OF UNUSUAL GRANTS RECEIVED:

DESCRIPTION: COMMUNITY GRANTS

DATE: 08/28/20 AMOUNT: 3600000.

For Public Disclosure

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization **CHARLOTTE COMMUNITY FOUNDATION INC** Employer identification number **65-0455319**

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	30	61
2 Aggregate value of contributions to (during year)	647,200.	7,429,801.
3 Aggregate value of grants from (during year)	66,500.	2,227,029.
4 Aggregate value at end of year	1,607,882.	20,225,381.
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

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

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

Preservation of land for public use (for example, recreation or education) Preservation of a historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

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

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

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

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

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

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

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

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

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

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

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

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

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

(i) Revenue included on Form 990, Part VIII, line 1 \$ _____

(ii) Assets included in Form 990, Part X \$ _____

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

a Revenue included on Form 990, Part VIII, line 1 \$ _____

b Assets included in Form 990, Part X \$ _____

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

Schedule D (Form 990) 2023

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange program
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

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

- 1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	7,515,346.	9,146,518.	8,603,441.	7,211,722.	6,237,647.
b Contributions	4,401,088.	73,653.	19,454.	1,018,806.	284,098.
c Net investment earnings, gains, and losses	1,332,434.	-1,317,428.	927,087.	920,517.	1,191,531.
d Grants or scholarships	502,688.	378,838.	403,464.	547,604.	501,554.
e Other expenditures for facilities and programs	2,084.	8,559.			
f Administrative expenses					
g End of year balance	12,744,096.	7,515,346.	9,146,518.	8,603,441.	7,211,722.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment 1.0510 %
 - b Permanent endowment 66.2162 %
 - c Term endowment 32.7329 %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|--|-----|----|
| (i) Unrelated organizations? | | X |
| (ii) Related organizations? | | X |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		293,514.		293,514.
b Buildings		2,138,324.	548,288.	1,590,036.
c Leasehold improvements				
d Equipment		88,545.	57,617.	30,928.
e Other		9,724.		9,724.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				1,924,202.

Part VII Investments - Other Securities

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

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

Part VIII Investments - Program Related.

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

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

Part IX Other Assets

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	

Part X Other Liabilities

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) REFUNDABLE SECURITY DEPOSIT	1,300.
(3) AGENCY FUNDS	1,507,575.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	

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

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

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

1	Total revenue, gains, and other support per audited financial statements		1	9,996,693.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a	1,551,194.	
b	Donated services and use of facilities	2b	250.	
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d	98,029.	
e	Add lines 2a through 2d	2e		1,649,473.
3	Subtract line 2e from line 1		3	8,347,220.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	27,054.	
b	Other (Describe in Part XIII.)	4b	197,593.	
c	Add lines 4a and 4b	4c		224,647.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	8,571,867.

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

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

1	Total expenses and losses per audited financial statements		1	3,305,035.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a	250.	
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d	13,750.	
e	Add lines 2a through 2d	2e		14,000.
3	Subtract line 2e from line 1		3	3,291,035.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	27,054.	
b	Other (Describe in Part XIII.)	4b	197,916.	
c	Add lines 4a and 4b	4c		224,970.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	3,516,005.

Part XIII Supplemental Information

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

PART V, LINE 4:

ENDOWMENT FUNDS ARE ADMINISTERED IN ACCORDANCE WITH THE TERMS OUTLINED IN AN ENDOWMENT FUND AGREEMENT OR OTHER BINDING DOCUMENTATION SUCH AS A LETTER OF INTENT FOR TESTAMENTARY GIFTS. DISTRIBUTIONS FROM ENDOWMENT FUNDS ARE MADE IN COMPLIANCE WITH FOUNDATION POLICIES, AND IN CONSULTATION WITH THE DONOR ENTITY AS APPROPRIATE. ENDOWMENT FUNDS FOR NONPROFIT ORGANIZATIONS, AGENCY OR DESIGNATED FUNDS, ARE TO SUPPORT THE ENTITY'S MISSION AS OUTLINED IN ITS BYLAWS.

PART X, LINE 2:

UNDER THE INCOME TAXES TOPIC OF THE FASB ACCOUNTING STANDARDS CODIFICATION, THE FOUNDATION HAS REVIEWED AND EVALUATED THE RELEVANT

Part XIII Supplemental Information (continued)

TECHNICAL MERITS OF EACH OF ITS TAX POSITIONS IN ACCORDANCE WITH ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA FOR ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES, AND DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS THAT WOULD HAVE A MATERIAL IMPACT ON THE FINANCIAL STATEMENTS OF THE FOUNDATION.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

CHANGE IN VALUE OF BENEFICIAL INTEREST IN TRUST 98,029.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

RENTAL EXPENSE -13,750.

AGENCY REVENUE 211,343.

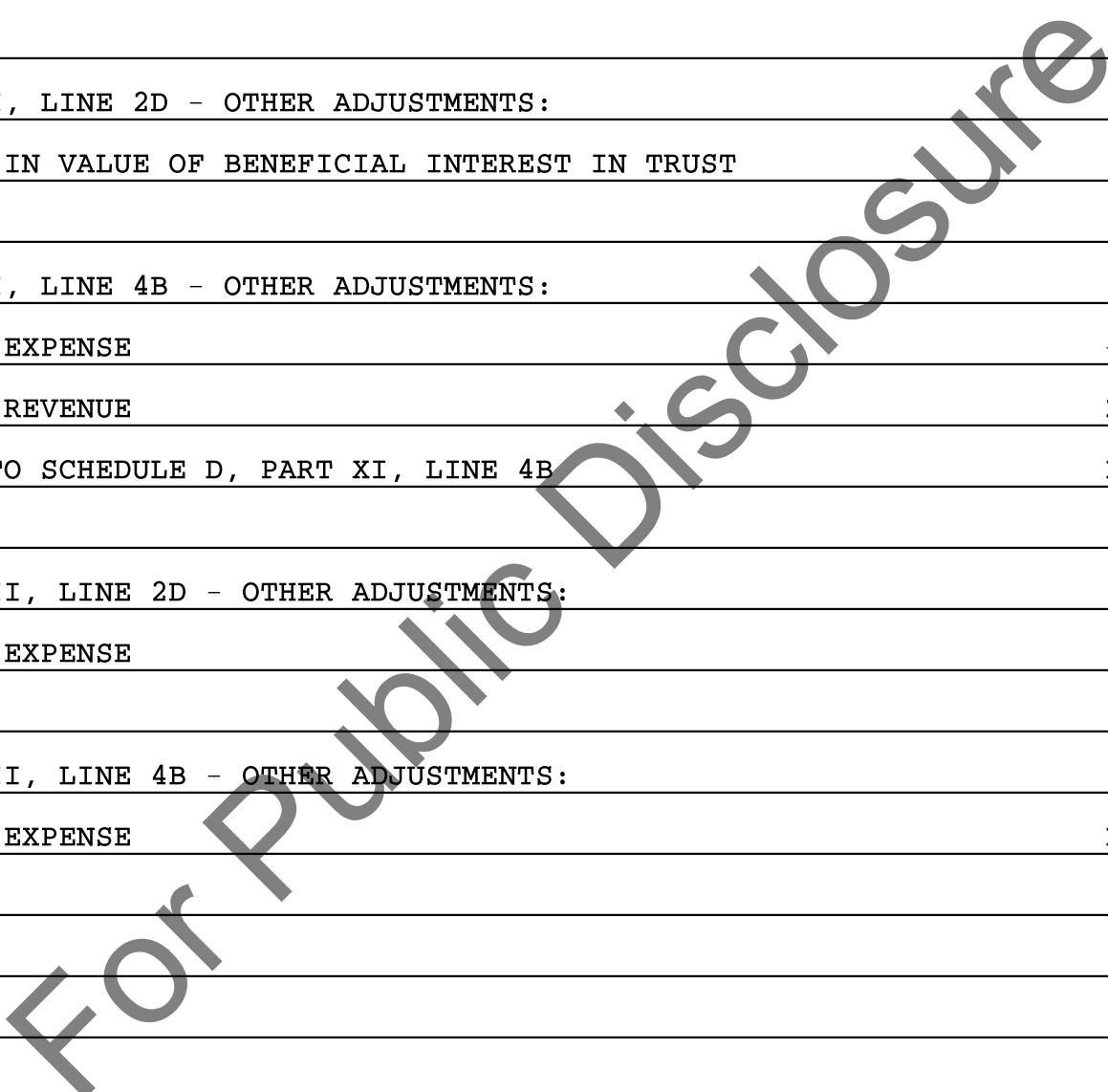
TOTAL TO SCHEDULE D, PART XI, LINE 4B 197,593.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

RENTAL EXPENSE 13,750.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

AGENCY EXPENSE 197,916.



SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.
Attach to Form 990.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization **CHARLOTTE COMMUNITY FOUNDATION INC** Employer identification number **65-045319**

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
GULF COAST PARTNERSHIP 408 TAMiami TRAIL, UNIT 121 PUNTA GORDA, FL 33950	38-3913077	501(C)(3)	462,500.	0.			SOCIAL SERVICES & WELFARE
BOYS & GIRLS CLUBS OF CHARLOTTE COUNTY - 21500 GIBRALTER DRIVE - PORT CHARLOTTE, FL 33952	65-0725247	501(C)(3)	281,000.	0.			SOCIAL SERVICES & WELFARE, EDUCATION
CHARLOTTE PREPARATORY SCHOOL 365 ORLANDO BLVD PORT CHARLOTTE, FL 33954	65-0661754	501(C)(3)	183,646.	0.			EDUCATION
CHARLOTTE COUNTY HOMELESS COALITION INC - 1476 KENESAW ST - PORT CHARLOTTE, FL 33948	65-0139525	501(C)(3)	161,000.	0.			SOCIAL SERVICES & WELFARE, HEALTH & MEDICAL
VIRGINIA B ANDES VOLUNTEER COMMUNITY CLINIC - 21297 OLEAN BLVD, UNIT B - CHARLOTTE HARBOR, FL 33952	65-0958642	501(C)(3)	111,861.	0.			SOCIAL SERVICES & WELFARE, HEALTH & MEDICAL
THE SALVATION ARMY P.O. BOX 495126 PORT CHARLOTTE, FL 33949	58-0660607	501(C)(3)	100,000.	0.			SOCIAL SERVICES & WELFARE

- 2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **47.**
- 3 Enter total number of other organizations listed in the line 1 table **2.**

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

Schedule I (Form 990) 2023

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
GULF COAST COMMUNITY FOUNDATION 601 S. TAMiami TRAIL VENICE, FL 34285	59-1052433	501(C)(3)	80,150.	0.			FOUNDATIONS & PARTNERSHIPS - UNITED WAY
SOCIETY OF ST. VINCENT DEPAUL 25200 AIRPORT ROAD PUNTA GORDA, FL 33950	80-0029958	501(C)(3)	74,430.	0.			SOCIAL SERVICES & WELFARE
PEACE RIVER BOTANICAL & SCULPTURE GARDENS, INC. - 5800 RIVERSIDE DR - PUNTA GORDA, FL 33982	26-3285783	501(C)(3)	65,000.	0.			SOCIAL SERVICES & WELFARE, ARTS, CULTURE
CHARLOTTE HIV/AIDS PEOPLE SUPPORT, INC. (C.H.A.P.S.) - 18200 PAULSEN DR - PORT CHARLOTTE, FL 33954	65-0498294	501(C)(3)	54,336.	0.			SOCIAL SERVICES & WELFARE
CENTER FOR ABUSE & RAPE EMERGENCIES (C.A.R.E.) - PO BOX 510234 - PUNTA GORDA, FL 33951	59-2435059	501(C)(3)	51,000.	0.			SOCIAL SERVICES & WELFARE
ANN STORCK CENTER 1790 SW 43RD WAY FORT LAUDERDALE, FL 33317	59-2171081	501(C)(3)	50,000.	0.			HEALTH & MEDICAL
PEACE RIVER COMMUNITY HOUSING PARTNERS - 408 TAMiami TRAIL, UNIT 121 - PUNTA GORDA, FL 33950	46-2200351	501(C)(3)	50,000.	0.			SOCIAL SERVICES & WELFARE
PEACE RIVER WILDLIFE CENTER 3400 PONCE DE LEON PARKWAY PUNTA GORDA, FL 33950	59-2535665	501(C)(3)	42,597.	0.			SOCIAL SERVICES & WELFARE, ANIMAL WELFARE, ENVIRONMENTAL & HISTORIC
JESUS LOVES YOU MINISTRY, INC. PO BOX 380275 MURDOCK, FL 33983	26-1128961	501(C)(3)	38,155.	0.			SOCIAL SERVICES & WELFARE

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PREGNANCY SOLUTIONS 504 E. VENICE AVENUE VENICE, FL 34285	65-1085310	501(C)(3)	34,987.	0.			FOUNDATIONS & PARTNERSHIPS - COMMUNITY GRANTS
WINTERGARDEN PRESBYTERIAN CHURCH 18305 WINTERGARDEN AVENUE PORT CHARLOTTE, FL 33948	23-6393377	501(C)(3)	30,000.	0.			SOCIAL SERVICES & WELFARE
ANIMAL WELFARE LEAGUE OF CHARLOTTE COUNTY - 3519 DRANCE STREET - PORT CHARLOTTE, FL 33980	59-1146309	501(C)(3)	27,495.	0.			CIVIC, ANIMAL WELFARE
CHARLOTTE COUNTY HABITAT FOR HUMANITY, INC. - 1750 MANZANA AVE. - PUNTA GORDA, FL 33950	59-2870908	501(C)(3)	25,000.	0.			SOCIAL SERVICES & WELFARE
GULFSHORE OPERA INC. 9911 CORKSCREW ROAD STE. 105 ESTERO, FL 33928	47-0989874	501(C)(3)	25,000.	0.			HEALTH & MEDICAL
YMCA OF SOUTHWEST FLORIDA 701 CENTER ROAD VENICE, FL 34285	59-1629660	501(C)(3)	24,430.	0.			SOCIAL SERVICES & WELFARE
BACK PACK KIDZ 1133 BAL HARBOR BLVD PUNTA GORDA, FL 33950	37-1475987	501(C)(3)	24,430.	0.			SOCIAL SERVICES & WELFARE
WATER 4 LIFE MOZAMBIQUE 42881 LAKE BABCOCK, SUITE 200 BABCOCK RANCH, FL 33982	46-5373602	501(C)(3)	23,095.	0.			SOCIAL SERVICES & WELFARE
PUNTA GORDA HISTORICAL SOCIETY 118 SULLIVAN STREET PUNTA GORDA, FL 33950	59-2361235	501(C)(3)	20,000.	0.			SOCIAL SERVICES & WELFARE

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TEAM PUNTA GORDA 227 SULLIVAN STREET PUNTA GORDA, FL 33950	20-2375899	501(C)(3)	19,612.	0.			CIVIC
MILITARY HERITAGE MUSEUM 900 W. MARION AVENUE PUNTA GORDA, FL 33950	65-1036360	501(C)(3)	18,016.	0.			CIVIC, SOCIAL SERVICES & WELFARE
ECHO INC. 17391 DURRANCE ROAD NORTH FORT MYERS, FL 33917	23-7275283	501(C)(3)	15,000.	0.			ENVIRONMENTAL & HISTORIC
SOUTHEASTERN GUIDE DOGS 4210 77TH STREET EAST PALMETTO, FL 34221	59-2252352	501(C)(3)	15,000.	0.			ANIMAL WELFARE
THE ACADEMY, CHARLOTTE COUNTY PUBLIC SCHOOLS - 18300 COCHRAN BLVD. - PORT CHARLOTTE, FL 33948	APPLIED FOR	501(C)(3)	15,000.	0.			EDUCATION
CANINE CASTAWAYS, INC. PO BOX 3295 ARCADIA, FL 34265	20-0416812	501(C)(3)	13,230.	0.			ENVIRONMENTAL & HISTORIC
SUNCOAST HUMANE SOCIETY 6781 SAN CASA DRIVE ENGLEWOOD, FL 34224	23-7174193	501(C)(3)	13,230.	0.			ENVIRONMENTAL & HISTORIC
HOME BASE FLORIDA VETERAN AND FAMILY CARE - 10501 FGCU BLVD S. - FT MYERS, FL 33965	04-1564655	501(C)(3)	12,500.	0.			CIVIC
PUNTA GORDA SYMPHONY, INC. PO BOX 511047 PUNTA GORDA, FL 33951	59-2029342	501(C)(3)	11,000.	0.			ARTS & CULTURE

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SOUTHERN COAST K9, INC. 690 META LANE NEW SMYRNA BEACH, FL 32168	27-3253302		10,500.	0.			CIVIC; PURCHASE OF POLICE DOG FOR CHARLOTTE COUNTY SHERRIFF'S K9 UNIT
FIRST PRESBYTERIAN CHURCH OF PORT CHARLOTTE - 2230 HARIET STREET - PORT CHARLOTTE, FL 33952	59-1835089	501(C)(3)	10,000.	0.			FOUNDATIONS & PARTNERSHIPS - COMMUNITY GRANTS
LOVELAND CENTER INC. 4075 TAMIAMI TRAIL PORT CHARLOTTE, FL 33952	59-1011392	501(C)(3)	10,000.	0.			SOCIAL SERVICES & WELFARE
ST. CHARLES BORROMEIO CATHOLIC SCHOOL - 21505 AUGUSTA AVENUE - PORT CHARLOTTE, FL 33952	59-0954766	501(C)(3)	10,000.	0.			EDUCATION
THE LEGACY FOUNDATION AT SHELL POINT INC - 15010 SHELL POINT BLVD - FORT MYERS, FL 33908	80-0002415	501(C)(3)	9,808.	0.			SOCIAL SERVICES & WELFARE
DOCTORS WITHOUT BORDERS USA 333 SEVENTH AVENUE 2ND FLOOR NEW YORK, NY 10001	13-3433452	501(C)(3)	9,314.	0.			HEALTH & MEDICAL
GILSTAD LITERACY FOUNDATION 312 SULLIVAN STREET PUNTA GORDA, FL 33950	87-2787392	501(C)(3)	8,575.	0.			EDUCATION
EMPORIA STATE UNIVERSITY FOUNDATION - 1500 HIGHLAND STREET - EMPORIA, KS 66801	48-6088451	501(C)(3)	8,000.	0.			EDUCATION
NOEL NEIGHBORHOOD MINISTRIES, INC. 520 HERNDON STREET SHREVEPORT, LA 71101	58-1698611	501(C)(3)	8,000.	0.			SOCIAL SERVICES & WELFARE, HEALTH & MEDICAL

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
RESTORING OAKS INC 3280 36 TAMIAMI TRAIL #255 PORT CHARLOTTE, FL 33952	84-3907258	501(C)(3)	7,500.	0.			BOARD DEVELOPMENT GRANT
LEMON BAY CONSERVANCY, INC. 1765 MANOR RD, UNIT A PLACIDA, FL 34223	59-6510980	501(C)(3)	6,800.	0.			SOCIAL SERVICES & WELFARE
SWEET SPARKMAN ARCHITECTS 1819 MAIN STREET STE 400 SARASOTA, FL 34236	54-2081005		6,063.	0.			DESIGN OF BEIRUT PEACEKEEPERS MEMORIAL TOWER MONUMENT
CHARLOTTE COUNTY ART GUILD, INC DBA THE VISUAL ARTS CENTER - 210 MAUD STREET - PUNTA GORDA, FL 33950	59-6192800	501(C)(3)	6,000.	0.			ARTS, CULTURE

For Public Disclosure

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

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
SCHOLARSHIPS	46	166,800.	0.		

Part IV Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

THEY ARE REQUIRED TO SUBMIT AN INTERIM REPORT AND A FINAL REPORT.

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2023

Open to Public Inspection

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization: **CHARLOTTE COMMUNITY FOUNDATION INC**
Employer identification number: **65-045319**

Part I	Types of Property	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications				
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded	X	2	31,476	NYSE
10	Securities - Closely held stock				
11	Securities - Partnership, LLC, or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation contribution - Historic structures				
14	Qualified conservation contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other ()				
26	Other ()				
27	Other ()				
28	Other ()				

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

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

For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2023

Part II

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

Lined area for supplemental information with a large diagonal watermark reading "For Public Disclosure".

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization

CHARLOTTE COMMUNITY FOUNDATION INC

Employer identification number

65-0455319

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

FOUNDATION (CCF) ACTS AS A CENTER OF PHILANTHROPY BY PROVIDING
PHILANTHROPIC EDUCATION, IMPACTFUL GRANTS, NONPROFIT TRAINING, AND
COMMUNITY LEADERSHIP. CCF PROVIDES PERMANENT COMMUNITY CAPITAL TO
SUPPORT (1) LOCAL NONPROFITS THROUGH COMPETITIVE AND DIRECTED
GRANTMAKING; (2) TRADITIONAL-AGE AND ADULT LEARNERS WITH SCHOLARSHIPS
FOR POST-SECONDARY TRAINING AT ALL LEVELS; AND (3) RESPONSIVE FUNDING
TO ADDRESS PRESSING COMMUNITY NEEDS AND TO ENHANCE THE VIBRANCY OF THE
COMMUNITY.

FORM 990, PART I, LINE 6 VOLUNTEERS

VOLUNTEERS ARE CRITICAL TO THE FOUNDATION AS THEY PROVIDE COMMUNITY
PERSPECTIVES AND ACCOUNTABILITY AND MAKE POSSIBLE THE WORK OF THE
ORGANIZATION IN ALL ASPECTS. THE CORE COMMITTEES OF THE BOARD OF
DIRECTORS, FINANCE & AUDIT, AND REVIEWERS FOR GRANTS AND SCHOLARSHIPS
ARE ALL VOLUNTEERS FROM THE COMMUNITY.

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

THE FOUNDATION'S BOARD OF DIRECTORS RECEIVED AND REVIEWED THE FORM 990
BEFORE FILING.

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

THIS POLICY RECOGNIZES THAT BOTH REAL AND APPARENT CONFLICTS OF INTEREST
AND DUALITIES OF INTEREST (HEREINAFTER REFERRED TO AS CONFLICTS) SOMETIMES
OCCUR IN THE COURSE OF CONDUCTING THE CORPORATION'S DAILY AFFAIRS. A

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

Schedule O (Form 990) 2023

LHA 332211 11-14-23

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CONFLICT, AS USED IN THIS POLICY, REFERS ONLY TO THE PERSONAL, PROPRIETARY INTERESTS OF THE PERSONS COVERED BY THIS POLICY AND THEIR CLOSE PERSONAL RELATIONSHIPS AND NOT TO PHILOSOPHICAL OR PROFESSIONAL DIFFERENCES IN OPINION. CONFLICTS OCCUR BECAUSE THE MANY PERSONS ASSOCIATED WITH THE CORPORATION SHOULD BE EXPECTED TO HAVE AND DO IN FACT GENERALLY HAVE MULTIPLE INTERESTS AND AFFILIATIONS AND VARIOUS POSITIONS OF RESPONSIBILITY WITHIN THE COMMUNITY. SOMETIMES A PERSON WILL OWE IDENTICAL DUTIES TO TWO OR MORE ORGANIZATIONS CONDUCTING SIMILAR ACTIVITIES. CONFLICTS ARE UNDESIREABLE BECAUSE THEY POTENTIALLY OR APPARENTLY PLACE THE INTERESTS OF OTHERS AHEAD OF THE CORPORATION'S OBLIGATIONS TO ITS CORPORATE PURPOSES AND TO PUBLIC INTEREST. CONFLICTS ARE ALSO UNDESIRABLE BECAUSE THEY OFTEN REFLECT ADVERSELY UPON THE PERSONS INVOLVED AND UPON THE INSTITUTIONS WITH WHICH THEY ARE AFFILIATED, REGARDLESS OF THE ACTUAL FACTS OR MOTIVATIONS OF THE PARTIES. HOWEVER, THE LONG-RANGE BEST INTERESTS OF THE CORPORATION DO NOT REQUIRE THE TERMINATION OF ALL ASSOCIATION WITH PERSONS WHO MAY HAVE REAL OR APPARENT CONFLICTS IF A PRESCRIBED AND EFFECTIVE METHOD CAN RENDER SUCH CONFLICTS HARMLESS TO ALL CONCERNED. THEREFORE, THE CORPORATION'S AFFIRMATIVE POLICY SHALL BE TO REQUIRE THAT ALL ACTUAL OR APPARENT CONFLICTS BE DISCLOSED PROMPTLY AND FULLY TO ALL NECESSARY PARTIES AND TO PROHIBIT SPECIFIED INVOLVEMENT IN THE AFFAIRS OF THE CORPORATION BY PERSONS HAVING SUCH CONFLICTS.

THIS POLICY SHALL APPLY TO THE DIRECTORS, OFFICERS, AGENTS AND EMPLOYEES OF THE CORPORATION, INCLUDING ADVISORY COUNCIL MEMBERS, OFFICE VOLUNTEERS AND INDEPENDENT CONTRACTOR PROVIDERS OF SERVICES AND MATERIALS. THE CORPORATION'S MANAGEMENT SHALL HAVE THE AFFIRMATIVE OBLIGATION TO PUBLICIZE PERIODICALLY THIS POLICY TO ALL SUCH PARTIES. DISCLOSURE OF ALL CONFLICTS TO EACH PERSON TO WHOM THIS POLICY APPLIES SHALL DISCLOSE ALL REAL AND

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APPARENT CONFLICTS, WHICH HE/SHE DISCOVERS OR HAS BROUGHT TO HIS/HER ATTENTION IN CONNECTION WITH THE CORPORATIONS ACTIVITIES. DISCLOSURE AS USED IN THIS POLICY SHALL MEAN PROVIDING PROMPTLY TO THE APPROPRIATE PERSONS A WRITTEN DESCRIPTION OF THE FACTS COMPRISING THE REAL OR APPARENT CONFLICT. ALL DISCLOSURE NOTICES RECEIVED HEREUNDER SHALL BE NOTED FOR THE RECORD IN THE MINUTES OF THE MEETING OF THE BOARD OF DIRECTORS. PRESCRIBED ACTIVITY BY PERSONS HAVING CONFLICTS WHEN A DIRECTOR, OFFICER, AGENT OR EMPLOYEE BELIEVES THAT HE/SHE OR A MEMBER OF HIS/HER IMMEDIATE FAMILY MIGHT HAVE OR DOES HAVE A REAL OR APPARENT CONFLICT, HE/SHE SHALL, IN ADDITION TO MAKING THE REQUIRED DISCLOSURE, ABSTAIN FROM MAKING MOTIONS, VOTING, EXECUTING AGREEMENTS, OR TAKING ANY OTHER SIMILAR DIRECT ACTION ON BEHALF OF THE CORPORATION WHERE THE CONFLICT MIGHT PERTAIN, BUT SHALL NOT BE PRECLUDED FROM DEBATE OR OTHER SIMILAR INVOLVEMENT ON BEHALF OF THE CORPORATION. WHEN ANY PERSON REQUESTS IN WRITING, OR UPON ITS OWN INITIATIVE, THE BOARD AT ANY TIME MAY ESTABLISH FURTHER GUIDELINES CONSISTENT WITH THE INTERESTS OF THE CORPORATION FOR THE RESOLUTION OF ANY REAL OR APPARENT CONFLICTS.

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

LINE 15A: CCF'S CEO IS EVALUATED ON AN ANNUAL BASIS, AS FOLLOWS: THE QUALITATIVE PERFORMANCE EVALUATION SHALL BE PRESENTED TO THE BOARD OF DIRECTORS DURING THE JULY BOARD OF DIRECTORS MEETING AND PRESENTED TO THE CEO NO LATER THAN 30 DAYS FOLLOWING THE BOARD'S APPROVAL. THE BOARD CHAIR SHALL DESIGNATE AND CONVENE A REVIEW COMMITTEE IN JUNE, WHICH MAY INCLUDE THE EXECUTIVE COMMITTEE AND/OR OTHER MEMBERS OF THE BOARD. IF THE CHAIR CHOOSES NOT TO UTILIZE A COMMITTEE, THE BOD SHALL BE CONSIDERED THE COMMITTEE FOR PURPOSES OF PERFORMANCE EVALUATION OF THE CEO. THE COMMITTEE SHALL FIRST MEET WITH THE CEO, INDIVIDUALLY OR AS A GROUP, TO IDENTIFY ANY

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SPECIFIC ISSUES, CONCERNS, OR OTHER CONDITIONS THAT MAY NOT BE GENERAL KNOWLEDGE TO ALL MEMBERS OF THE COMMITTEE. THE CEO WILL COMPLETE A PERFORMANCE EVALUATION FORM, PROVIDING A PERSONAL SELF-EVALUATION, WHICH SHALL BE PROVIDED TO COMMITTEE MEMBERS.

COMMITTEE MEMBERS WILL THEN COMPLETE A PERFORMANCE EVALUATION FORM, PROVIDING RANKINGS AND COMMENTS ON BOTH PROFESSIONAL AND PERSONAL PERFORMANCE FACTORS. AREAS TO BE ADDRESSED IN THE PERFORMANCE EVALUATION FORM SHALL INCLUDE: PROFESSIONAL FACTORS: STRATEGIC PLANNING AND EXECUTION; GOVERNANCE AND COMPLIANCE; ASSET DEVELOPMENT; FINANCIAL MANAGEMENT; COMMUNITY OUTREACH, EDUCATION, MARKETING AND PHILANTHROPY; STAFF MANAGEMENT/OPERATIONS; AND LINKAGE WITH OTHER FUND-RAISING AND PHILANTHROPIC GROUPS. PERSONAL FACTORS: COMMUNICATION; LEADERSHIP; COOPERATION/COLLABORATION; CREATIVITY; INITIATIVE; ANALYSIS; RELIABILITY AND EFFECTIVENESS; ORGANIZATIONAL UNDERSTANDING; PROFESSIONALISM; AND JUDGEMENT. COMMITTEE INPUT WILL BE COMPILED INTO A REPORT WHICH WILL BE PRESENTED AT THE JULY BOARD MEETING TO GAIN AGREEMENT AND RECEIVE ANY ADDITIONAL INPUT FROM THE FULL BOARD. FOLLOWING THIS BOARD MEETING, THE BOARD CHAIR AND VICE CHAIR WILL SHARE THE RESULTS OF THE QUALITATIVE PERFORMANCE REVIEW WITH THE CEO, WHO SHALL SIGN THE EVALUATION AS CONFIRMATION THAT IT WAS RECEIVED.

A QUANTITATIVE EVALUATION OCCURS IN THE FIRST QUARTER OF THE SUBSEQUENT YEAR, FOLLOWING THE CLOSURE OF THE FOUNDATION'S FY FINANCIALS IN JANUARY. ANY POTENTIAL BONUS COMPENSATION MAY BE AWARDED UPON COMPLETION OF THE QUANTITATIVE EVALUATION. AT THE START OF EACH FISCAL YEAR, THE CEO SHOULD WORK WITH THE EXECUTIVE COMMITTEE TO ESTABLISH KEY PERFORMANCE INDICATORS FOR THE COMING YEAR. USING THE STRATEGIC PLAN AS A STARTING POINT, THIS

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DIALOGUE SHOULD PRODUCE AN INITIAL SET OF AGREED-UPON WEIGHTED KEY PERFORMANCE INDICATORS AND ASSOCIATED MEASUREMENTS. UPON REVIEWING AND AMENDING THE GOALS, IF NEEDED, THE FINAL SET SHALL BE DISCUSSED AND APPROVED BY THE FULL BOARD. KEY PERFORMANCE INDICATOR AREAS OF EMPHASIS SHALL INCLUDE: FINANCE AND ADMINISTRATION, FUNDRAISING, MARKETING AND COMMUNICATIONS, HUMAN RESOURCES/OPERATIONS. UPON CLOSURE OF CCF'S FY FINANCIALS IN JANUARY AND BEFORE THE CEO'S QUANTITATIVE REVIEW, THE EXECUTIVE COMMITTEE SHALL REVIEW THE KEY PERFORMANCE INDICATORS AND CEO'S PROGRESS AGAINST THEM. THE COMMITTEE SHALL ASSESS IF AND HOW THE CEO MET OR EXCEEDED THESE MEASURES AND IDENTIFY AREAS THAT REQUIRE CLOSER ATTENTION. REVISIONS TO THE GOALS ESTABLISHED MAY BE MADE AT THIS TIME IN LIGHT OF CHANGED CIRCUMSTANCES, SUCH AS RAPIDLY CHANGING BUSINESS CONDITIONS.

LINE 15B: THE CEO AND DIRECT SUPERVISORS CONDUCT ANNUAL PERFORMANCE REVIEWS WITH KEY EMPLOYEES ON THEIR ANNIVERSARY DATE OF HIRE OR PROMOTION TO A NEW ROLE. BASED ON OVERALL PERFORMANCE (GOALS ARE ESTABLISHED IN ADVANCE) DIRECT SUPERVISORS MAKE A RECOMMENDATION TO THE CEO.

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

THE GOVERNING DOCUMENTS ARE MADE AVAILABLE TO THE PUBLIC UPON REQUEST.

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

AGENCY REVENUES	-211,343.
AGENCY EXPENSES	197,916.
CHANGE IN VALUE OF BENEFICIAL INTEREST IN TRUST	98,029.
TOTAL TO FORM 990, PART XI, LINE 9	84,602.

FORM 990, PART XII, LINE 2C AUDIT REVIEW PROCESS

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THE AUDIT REVIEW PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.

For Public Disclosure