# \*\* PUBLIC DISCLOSURE COPY \*\* Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public.

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

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

Inspection

| A I          | For the                    | e 2023 calendar year, or tax year beginning   | and                                 | l ending       |                              |   |  |  |  |  |
|--------------|----------------------------|---|-------------------------------------|----------------|------------------------------|---|--|--|--|--|
| В            | Check if<br>applicable     | C Name of organization  AMERICAN COUNCIL FOR AN   | N ENERGY-EFFICIA                    | ENT            | D Employer identifi          | cation number                           |  |  |  |  |
|              | Addre                      | SS EGONOMY  |                                     |                |                              |   |  |  |  |  |
|              | Name<br>chang              | Doing business as   |                                     |                | 94-27117                     | 94-2711707                              |  |  |  |  |
|              | Initial<br>return          | Number and street (or P.O. box if mail is not del   | ivered to street address)           | Room/suite     | E Telephone numbe            |   |  |  |  |  |
|              | Final<br>return/<br>termin | _   |                                     | 600            |                              | 7-4000                                  |  |  |  |  |
|              | termin<br>ated<br>Amend    |   | ZIP or foreign postal code          |                | G Gross receipts \$          | 13,757,064.                             |  |  |  |  |
| F            | return                     | WASHINGION, DC 20045  | TOTAL MADEL                         |                | H(a) Is this a group r       |   |  |  |  |  |
| L            | Application pendir         | F Name and address of principal officer: STE  | VEN NADEL                           |                | for subordinates             |   |  |  |  |  |
| _            | Tay ay                     |   | (insert no.) 4947(a)(1)             | or 527         | H(b) Are all subordinates in |   |  |  |  |  |
|              | Websit                     |   | (insert no.) 4947(a)(1)             | 01 327         | H(c) Group exemption         | list. See instructions                  |  |  |  |  |
|              |                            |   | sociation Other                     | 1 Year         |                              | M State of legal domicile: CA           |  |  |  |  |
|              | art I                      | Summary   |                                     | <b>L</b> 1041  | or formation: 2300 1         | VI Otate of legal dofficile. O22        |  |  |  |  |
|              | 1                          | Briefly describe the organization's mission or most   | significant activities: ACEE        | E SEEK         | S TO DEVELO                  | P POLICIES                              |  |  |  |  |
| Governance   |                            | TO REDUCE ENERGY WASTE ANI  |                                     |                |                              |   |  |  |  |  |
| nai          | 2                          | Check this box if the organization discor   | ntinued its operations or dispo     | sed of more    | than 25% of its net as       | sets.                                   |  |  |  |  |
| Ş.           | 3                          | Number of voting members of the governing body  | Part VI, line 1a)                   |                | 3                            | 21                                      |  |  |  |  |
| Ğ            | 4                          | Number of independent voting members of the gov   | rerning body (Part VI, line 1b)     |                | 4                            | 21                                      |  |  |  |  |
| δ.<br>S      | 5                          | Total number of individuals employed in calendar y  | ear 2023 (Part V, line 2a)          |                | 5                            | 98                                      |  |  |  |  |
| Vitie        | 6                          | Total number of volunteers (estimate if necessary)  |                                     |                | 6                            | 21                                      |  |  |  |  |
| Activities & | 7 a                        | Total unrelated business revenue from Part VIII, col  | umn (C), line 12                    |                | 7a                           | 0.                                      |  |  |  |  |
| _            | b                          | Net unrelated business taxable income from Form   | 990-T, Part I, line 11              | <u></u>        |                              | 0.                                      |  |  |  |  |
|              |                            |   |                                     |                | Prior Year                   | Current Year                            |  |  |  |  |
| <u>a</u>     | 8                          |   |                                     |                | 6,399,740.                   | 8,964,432.                              |  |  |  |  |
| Revenue      | 9                          |   |                                     |                | 3,702,986.                   | 4,628,065.                              |  |  |  |  |
| ě            | 10                         | Investment income (Part VIII, column (A), lines 3, 4,   |                                     |                | 259,018.                     | 134,334.                                |  |  |  |  |
| _            | 11                         | Other revenue (Part VIII, column (A), lines 5, 6d, 8c,  |                                     |                | 2,415.                       | 30,233.                                 |  |  |  |  |
|              |                            | Total revenue - add lines 8 through 11 (must equal  |                                     |                | 10,364,159.                  | 13,757,064.                             |  |  |  |  |
|              | 1                          | Grants and similar amounts paid (Part IX, column (  |                                     |                | 0.                           | 290,000.                                |  |  |  |  |
|              | 1                          | Benefits paid to or for members (Part IX, column (A   |                                     |                | 0.                           | 0.                                      |  |  |  |  |
| es           | 15                         | Salaries, other compensation, employee benefits (F  |                                     |                | 8,628,555.                   | 9,362,256.                              |  |  |  |  |
| Expenses     | 16a                        | Professional fundraising fees (Part IX, column (A), li  | 262                                 | <u> </u>       | <u> </u>                     | 0.                                      |  |  |  |  |
| EXD          | 1 D                        | Total fundraising expenses (Part IX, column (D), line   | ' <del>'</del>                      |                | 4,321,599.                   | 4,296,408.                              |  |  |  |  |
|              | ''                         | Other expenses (Part IX, column (A), lines 11a-11d,   |                                     |                | 12,950,154.                  | 13,948,664.                             |  |  |  |  |
|              | 1                          | Total expenses. Add lines 13-17 (must equal Part I) Revenue less expenses. Subtract line 18 from line |                                     |                | -2,585,995.                  | -191,600.                               |  |  |  |  |
| 9            |                            | nevertue less expenses. Subtract line 16 from line  | 12                                  | Be             | ginning of Current Year      | End of Year                             |  |  |  |  |
| t Assets or  | 20                         | Total assets (Part X, line 16)  |                                     |                | 18,572,670.                  | 19,729,055.                             |  |  |  |  |
| ASSE         | 21                         | Total liabilities (Part X, line 16)   |                                     |                | 8,663,498.                   | 8,896,505.                              |  |  |  |  |
| Net          |                            | Net assets or fund balances. Subtract line 21 from  | line 20                             |                | 9,909,172.                   | 10,832,550.                             |  |  |  |  |
|              | art II                     | Signature Block   |                                     |                | , ,                          | , |  |  |  |  |
| Und          | ler pena                   | Ities of perjury, I declare that I have examined this return,   | including accompanying schedule     | es and stateme | ents, and to the best of my  | y knowledge and belief, it is           |  |  |  |  |
| true         | , correc                   | t, and complete. Declaration of preparer (other than office   | r) is based on all information of w | hich preparer  | has any knowledge.           |   |  |  |  |  |
|              |                            |   |                                     |                |                              |   |  |  |  |  |
| Sig          | n                          | Signature of officer  |                                     |                | Date                         |   |  |  |  |  |
| Her          | ·e                         | ·   | RECTOR                              |                |                              |   |  |  |  |  |
|              |                            | Type or print name and title  |                                     |                |                              |   |  |  |  |  |
|              |                            | Print/Type preparer's name  | Preparer's signature                |                | Date Check [                 | PTIN                                    |  |  |  |  |
| Paid         | d                          |   | JULIA L. LAFFER                     | TY 1           | 1/08/24 self-emplo           |   |  |  |  |  |
|              | parer                      | Firm's name COUNCILOR, BUCHANA  |                                     | P.C.           | Firm's EIN 5                 | 2-1711839                               |  |  |  |  |
| Use          | Only                       | Firm's address 7910 WOODMONT AVE  |                                     |                |                              |   |  |  |  |  |
|              |                            | BETHESDA, MD 2081   |                                     |                | Phone no. (3                 |   |  |  |  |  |
| Ma           | y the IF                   | RS discuss this return with the preparer shown abor   | ve? See instructions                |                |                              | X Yes No                                |  |  |  |  |

| Pai | t 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:   |
|     | ACEEE SEEKS TO AGGRESSIVELY MOBILIZE AND SCALE UP ENERGY EFFICIENCY TO   |
|     | REDUCE GREENHOUSE GAS EMISSIONS AND COMBAT CLIMATE CHANGE, AND TO DO   |
|     | SO AT SUBSTANTIAL ECONOMIC SAVINGS. WE SEEK A VIBRANT AND EQUITABLE  |
|     | ECONOMY THAT USES ENERGY MORE PRODUCTIVELY, REDUCES ENERGY COSTS, AND  |
| 2   | Did the organization undertake any significant program services during the year which were not listed on the                                 |
|     | prior Form 990 or 990-EZ? $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$  |
|     | If "Yes," describe these new services on Schedule O.   |
| 3   | Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X No                        |
|     | If "Yes," describe these changes on Schedule O.  |
| 4   | Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.         |
|     | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and |
|     | revenue, if any, for each program service reported.  |
| 4a  | (Code:) (Expenses \$9,376,689. including grants of \$290,000. ) (Revenue \$2,851,892. )  |
|     | RESEARCH AND OUTREACH - ENERGY EFFICIENCY IS ESSENTIAL TO COMBATING  |
|     | CLIMATE CHANGE. IT CAN HALVE ENERGY USE AND EMISSIONS, GETTING US  |
|     | HALFWAY TO U.S. CLIMATE GOALS. OUR RESEARCH FOCUSES ON THE ROLE  |
|     | EFFICIENCY CAN PLAY IN THE U.S., DOCUMENTING SUCCESSFUL PROGRAMS AND   |
|     | POLICIES AND LESSONS LEARNED, AND WAYS TO ADDRESS CHALLENGES. ALL OF   |
|     | OUR WORK IS GROUNDED IN A FOUNDATION OF EQUITY AND ACCESS TO A CLEAN   |
|     | ENERGY ECONOMY.  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
| 4b  | (Code:) (Expenses \$1,613,551. including grants of \$0. (Revenue \$1,776,173. )  |
|     | CONFERENCES - WE SPARK ADVANCEMENTS IN INNOVATIVE TECHNOLOGIES,  |
|     | POLICIES, AND PROGRAMS BY CONVENING THOUSANDS OF PEOPLE AT OUR   |
|     | CONFERENCES AND VIRTUAL EVENTS EACH YEAR. WE HOLD ROUGHLY 20 WEBINARS  |
|     | ANNUALLY TO DISCUSS OUR RESEARCH AND RELATED TOPICS. IN TYPICAL YEARS,   |
|     | WE HOLD 3-4 CONFERENCES ON TOPICS SUCH AS BUILDING AND INDUSTRIAL  |
|     | EFFICIENCY, HOT WATER AND HOT AIR, AND ENERGY EFFICIENCY AS A RESOURCE.  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
| 4c  | (Code:) (Expenses \$ 27 , 787 • including grants of \$ 0 •) (Revenue \$ 0  |
| 70  | POLICY ADVOCACY - WE HELP ADVANCE EFFICIENCY PROGRAMS AND POLICIES BY  |
|     | ADVISING AGENCIES ON IMPLEMENTATION AND ASSISTING WITH DEVELOPMENT OF  |
|     | LAWS REQUIRING ENERGY-EFFICIENT EQUIPMENT AND PROMOTING EFFICIENCY IN  |
|     | INDUSTRY, TRANSPORTATION AND NEW AND EXISTING BUILDINGS.   |
|     | INDUDIRI, IRANGI ORIATION AND NEW AND EXIDIING BUILDINGS.  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     |  |
|     | Other are green and is a (Describe on Cahadala O.)   |
| 4d  | Other program services (Describe on Schedule O.)   |
|     | (Expenses \$ including grants of \$ ) (Revenue \$ )  Total program service expenses 11,018,027.  |
| 40  | Total program service expenses 11,018,027.   |

ECONOMY 94-2711707

Form 990 (2023) ECONOMY

Part IV Checklist of Required Schedules

|            |   |            | Yes      | No       |
|------------|---|------------|----------|----------|
| 1          | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?   |            |          |          |
|            | If "Yes," complete Schedule A   | 1          | _X_      |          |
| 2          | Is the organization required to complete Schedule B, Schedule of Contributors? See instructions   | 2          | X        |          |
| 3          | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for   |            |          |          |
|            | public office? If "Yes," complete Schedule C, Part I  | 3          |          | <u>X</u> |
| 4          | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect  |            |          |          |
|            | during the tax year? If "Yes," complete Schedule C, Part II   | 4          | _X_      |          |
| 5          | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or  |            |          | 7.7      |
|            | similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III   | 5          |          | <u>X</u> |
| 6          | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to   |            |          | 37       |
|            | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I  | 6          |          | <u> </u> |
| 7          | Did the organization receive or hold a conservation easement, including easements to preserve open space,   |            |          | 37       |
|            | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II  | 7          |          | <u>X</u> |
| 8          | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete  |            |          | 37       |
|            | Schedule D, Part III  | 8          |          | <u> </u> |
| 9          | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for   |            |          |          |
|            | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?   |            | 37       |          |
|            | If "Yes," complete Schedule D, Part IV  | 9          | <u> </u> |          |
| 10         | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments  |            |          | 37       |
|            | or in quasi-endowments? If "Yes," complete Schedule D, Part V   | 10         |          | <u>X</u> |
| 11         | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X,   |            |          |          |
|            | as applicable.  |            |          |          |
| а          | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,   |            | 37       |          |
|            | Part VI   | 11a        | _X_      |          |
| b          | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total  |            |          | 37       |
|            | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII   | 11b        |          | <u>X</u> |
| С          | Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total   |            |          | 37       |
|            | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII  | 11c        |          | <u>X</u> |
| d          | Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in   |            | v        |          |
|            | Part X, line 16? If "Yes," complete Schedule D, Part IX   | 11d        | X        |          |
| _          | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X   | 11e        | _X_      |          |
| f          | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses   |            |          | v        |
|            | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X  | 11f        |          | _X_      |
| 12a        | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete   |            | v        |          |
|            | Schedule D, Parts XI and XII  | 12a        | X        |          |
| b          | Was the organization included in consolidated, independent audited financial statements for the tax year?   |            |          | v        |
|            | If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional   | 12b        |          | X        |
| 13         | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E   | 13         |          | <u>X</u> |
| 14a        | Did the organization maintain an office, employees, or agents outside of the United States?   | 14a        |          |          |
| b          | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,   |            |          |          |
|            | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000  | 446        |          | Х        |
| 15         | or more? If "Yes," complete Schedule F, Parts I and IV  | 14b        |          |          |
| 15         | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any   | 15         | Х        |          |
| 46         | foreign organization? If "Yes," complete Schedule F, Parts II and IV  | 15         | -22      |          |
| 16         | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to  | 46         |          | y        |
| 17         | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV   | 16         |          | <u>X</u> |
| 17         | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,   | 47         |          | Х        |
| 10         | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions  | 17         |          | -21      |
| 18         | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines  | 18         |          | х        |
| 10         | 1c and 8a? If "Yes," complete Schedule G, Part II  Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"   | 10         |          | -21      |
| 19         | ,   | 19         |          | Х        |
| 20-        | complete Schedule G, Part III   |            |          | X        |
| 20a<br>h   | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H   | 20a<br>20b |          | -21      |
| 21         | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?  Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or | 200        |          |          |
| <u>~ I</u> | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II   | 21         |          | х        |
|            | domestic government out ratery, column (-y, interest in test complete scriedule i, Parts rand ii  | <u> </u>   |          |          |

332003 12-21-23

Form **990** (2023)

Page 3

| Form | 1990 (2023) ECONOMY 94-271   | <u> 1707</u> | Р   | age 4       |
|------|--|--------------|-----|-------------|
| Pai  | t IV Checklist of Required Schedules (continued)   |              |     |             |
|      |  |              | Yes | No          |
| 22   | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on  |              |     |             |
|      | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III  | 22           |     | X           |
| 23   | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current  |              |     |             |
|      | and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete   |              |     |             |
|      | Schedule J   | 23           | Х   |             |
| 24a  | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the  |              |     |             |
|      | last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete   |              |     |             |
|      | Schedule K. If "No," go to line 25a  | 24a          |     | х           |
| b    | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?  | <b>-</b>     |     |             |
|      | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease   |              |     |             |
| ·    | any tax-exempt bonds?  | 24c          |     |             |
| ч    | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?  | 24d          |     |             |
|      | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit   | 240          |     |             |
| ZJa  |  | 25a          |     | x           |
| h    | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I  | 254          |     |             |
| b    |  |              |     |             |
|      | that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete  | 054          |     | x           |
| 00   | Schedule L, Part I   | 25b          |     |             |
| 26   | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current  |              |     |             |
|      | or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35%  |              |     | 37          |
|      | controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II   | 26           |     | X           |
| 27   | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee,  |              |     |             |
|      | creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled  |              |     |             |
|      | entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III   | 27           |     | X           |
| 28   | Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV,  |              |     |             |
|      | instructions for applicable filing thresholds, conditions, and exceptions):  |              |     |             |
| а    | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If   |              |     | l           |
|      | "Yes," complete Schedule L, Part IV  | 28a          |     | X           |
| b    | A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV  | 28b          |     | X           |
| С    | A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If   |              |     |             |
|      | "Yes," complete Schedule L, Part IV  | 28c          |     | X           |
| 29   | Did the organization receive more than \$25,000 in noncash contributions? If "Yes," complete Schedule M  | 29           |     | Х           |
| 30   | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation  |              |     |             |
|      | contributions? If "Yes," complete Schedule M   | 30           |     | X           |
| 31   | Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I   | 31           |     | X           |
| 32   | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete   |              |     |             |
|      | Schedule N, Part II  | 32           |     | X           |
| 33   | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations   |              |     |             |
|      | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I  | 33           |     | X           |
| 34   | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and  |              |     |             |
|      | Part V, line 1   | 34           |     | X           |
| 35a  | Did the organization have a controlled entity within the meaning of section 512(b)(13)?  | 35a          |     | Х           |
|      | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity  |              |     |             |
|      | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2  | 35b          |     |             |
| 36   | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?   |              |     |             |
|      | If "Yes," complete Schedule R, Part V, line 2  | 36           |     | x           |
| 37   | Did the organization conduct more than 5% of its activities through an entity that is not a related organization   | 00           |     |             |
| 31   | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI   | 37           |     | x           |
| 20   | , ,  | 37           |     | <del></del> |
| 38   | Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?   | 20           | Х   | 1           |
| Pai  | Note: All Form 990 filers are required to complete Schedule 0  't V Statements Regarding Other IRS Filings and Tax Compliance  | 38           | 21  |             |
| L    | Charlet Cahadula Charletina a vanagana ay nata ta any lina in this Bort V  |              |     |             |
|      | Check if Schedule O contains a response or note to any line in this Part V   |              |     | <u> </u>    |
|      | Establis and the control of the cont | 7            | Yes | No          |
|      | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable 1a 4  | _            |     |             |
|      | Enter the manuscript of the Wize molecules of the California of th | 익            |     |             |
| С    | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming   |              | 77  |             |
|      | (gambling) winnings to prize winners?  | 1 10         | X   | 1           |

Form 990 (2023)

**ECONOMY** 

94-2711707 Page 5

| Pai       | art V Statements Regarding Other IRS Filings and Tax Compliance (continued)   |                    |                |      |      |
|-----------|---|--------------------|----------------|------|------|
|           |   |                    |                | Yes  | No   |
| 2a        | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,   |                    |                |      |      |
|           | filed for the calendar year ending with or within the year covered by this return   | 98                 |                |      |      |
| b         |   |                    | 2b             | Х    |      |
| 3a        | P. I. I   | Г                  | 3a             |      | Х    |
|           | KING III III III II II II II II II II II II   | Г                  | 3b             |      |      |
|           | o It "Yes," has it filed a Form 990-1 for this year? If "No" to line 3b, provide an explanation on Schedule O   |                    | OD             |      |      |
| ти        | financial account in a foreign country (such as a bank account, securities account, or other financial account)?  |                    | 4a             |      | х    |
| h         | If "Yes," enter the name of the foreign country   |                    | <del>T</del> a |      |      |
| b         | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).   | — I                |                |      |      |
| 50        |   |                    | 5a             |      | Х    |
| b         |   |                    | 5b             |      | X    |
|           |   |                    | 5c             |      | - 21 |
| C<br>62   |   |                    | 30             |      |      |
| 6a        |   |                    | 60             |      | Х    |
| h         | any contributions that were not tax deductible as charitable contributions?  If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts     | ····               | 6a             |      | - 21 |
| Ь         |   |                    | 6h             |      |      |
| 7         |   |                    | 6b             |      |      |
| 7         | Organizations that may receive deductible contributions under section 170(c).   | o novoro           | 70             |      | Х    |
| a         |   | Г                  | 7a             |      | - 22 |
| b         | ,   | ·····              | 7b             |      |      |
| С         |   |                    | 7-             |      | Х    |
|           | to file Form 8282?  |                    | 7c             |      | Λ    |
| d         | ,   | -                  | 7-             |      | Х    |
| e         | 37 1 71   |                    | 7e             |      | X    |
| †         | · · · · · · · · · · · · · · · · · · ·   |                    | 7f             | N/   |      |
| g         |   | · · · Г            | 7g             | N/   |      |
| h         |   | 98-07              | 7h             | T/ / | Λ.   |
| 8         | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the  | 1/A                | _              |      |      |
| _         |   | !/.क़ }            | 8              |      |      |
| 9         | Sponsoring organizations maintaining donor advised funds.   | 1/2                | 0-             |      |      |
| a         | ,   | 1/A                | 9a             |      |      |
| b         | ,   | ¹//. <del>Ω</del>  | 9b             |      |      |
| 10        | Section 501(c)(7) organizations. Enter:   |                    |                |      |      |
| a         | , , , , , , , , , , , , , , , , , , ,   |                    |                |      |      |
| b         |   |                    |                |      |      |
| 11        | Section 501(c)(12) organizations. Enter:  Gross income from members or shareholders  N/A 11a  |                    |                |      |      |
| a         |   | -                  |                |      |      |
| Ь         | Gross income from other sources. (Do not net amounts due or paid to other sources against   |                    |                |      |      |
| 10-       | amounts due or received from them.) 11b    a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?   | -                  | 10-            |      |      |
|           | 37/7   31   | - 1                | 12a            |      |      |
|           |   | -                  |                |      |      |
| 13        | Section 501(c)(29) qualified nonprofit health insurance issuers.  Is the organization licensed to issue qualified health plans in more than one state?  | 1/A                | 13a            |      |      |
| а         |   | !/. <del>f.}</del> | ısa            |      |      |
| h         | <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.  |                    |                |      |      |
| b         | Enter the amount of reserves the organization is required to maintain by the states in which the  |                    |                |      |      |
| _         | organization is licensed to issue qualified health plans  Enter the amount of reserves on hand  13b   |                    |                |      |      |
| C<br>1/10 |   |                    | 1/10           |      | Х    |
| 14a       | · · · · · · · · · · · · · · · · · · ·   | Г                  | 14a            |      | - 22 |
| 15        | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O   |                    | 14b            |      |      |
| 15        |   |                    | 15             |      | Х    |
|           | excess parachute payment(s) during the year?  |                    | 15             |      | 21   |
| 16        | If "Yes," see the instructions and file Form 4720, Schedule N.  |                    | 16             |      | Х    |
| 16        | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?  If "Yes," complete Form 4720, Schedule O.  |                    | 10             |      |      |
| 17        | •   |                    |                |      |      |
| 17        | Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities  that would result in the imposition of an excise tay under section 4951, 4952 or 49532 | <sub>1/2</sub>     | 17             |      |      |
|           | that would result in the imposition of an excise tax under section 4951, 4952 or 4953?  If "Yes." complete Form 6069.   | : A.t.t            | 17             |      |      |

Form **990** (2023)

**ECONOMY** 94-2711707 Form 990 (2023) 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 21 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. 21 **b** Enter the number of voting members included on line 1a, above, who are independent Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other Х officer, director, trustee, or key employee? 2 Did the organization delegate control over management duties customarily performed by or under the direct supervision 3 of officers, directors, trustees, or key employees to a management company or other person? 3 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? 4 Did the organization become aware during the year of a significant diversion of the organization's assets? Did the organization have members or stockholders? 6 Х 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or Х more members of the governing body? 7a b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? 7b Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? 8a **b** Each committee with authority to act on behalf of the governing body? 8b 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 Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

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

#### Section C. Disclosure

| 17 | List the states with which a copy of this Form 990 is required to be filed | CA |
|----|--|----|
|----|--|----|

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

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.

State the name, address, and telephone number of the person who possesses the organization's books and records

THE ORGANIZATION - (202) 507-4000

WASHINGTON 529 14TH STREET NW, 600,

Form **990** (2023)

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

#### Form 990 (2023)

94-2711707

# 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-NEĆ) of more than \$100,000 from the organization and any related organizations.

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

- 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.

| Name and title   | (A)                             | (B)      | J      |         | ((      | C)     |           |      | (D)      | (E)       | (F)     |
|--|---------------------------------|----------|--------|---------|---------|--------|-----------|------|----------|-----------|---------|
| Nours for related organizations   Nours for form the organizations   Nours for form the organizations   Nours f | Name and title                  | Average  | (do    |         |         |        |           | one  | •        | ·         |         |
| Very    |                                 | 1 '      | box    | , unle  | ss pe   | rson i | s both    | n an | · '      |           |         |
| STEVE NADEL  |                                 | <b>I</b> |        | Cer ai  | lu a u  | recto  | I / ii us | lee) |          |           |         |
| STEVE NADEL  |                                 | 1 '      | irecto |         |         |        |           |      |          | •         | •       |
| STEVE NADEL  |                                 |          | e or d | tee     |         |        | sated     |      |          | •         |         |
| STEVE NADEL  |                                 |          | ruste  | al trus |         | yee    | mpen      |      | ,        | 1000 NEO) |         |
| STEVE NADEL  |                                 | 1 "      | dualt  | ution   | <u></u> | m plo  | st co     | -i-  |          |           |         |
| Time terms   Time   T |                                 | line)    | Indivi | Instit  | Office  | Key e  | Highe     | Form |          |           | · ·     |
| Chief Operating Officer  | (1) STEVE NADEL                 | 40.00    |        |         |         |        |           |      |          |           |         |
| CHIEF OPERATING OFFICER  | EXECUTIVE DIRECTOR              |          |        |         | Х       |        |           |      | 328,812. | 0.        | 38,417. |
| CAMRON S ASSADI  | (2) NAOMI BAUM                  | 40.00    |        |         |         |        |           |      |          |           |         |
| SENIOR DIRECTOR FOR COMMS & MKT   40.00   X   172,591.   0. 36,614.  | CHIEF OPERATING OFFICER         |          |        |         | Х       |        |           |      | 259,607. | 0.        | 18,748. |
| (4) NORA ESRAM   | (3) CAMRON S ASSADI             | 40.00    |        |         |         |        |           |      |          |           |         |
| SENIOR DIRECTOR, RESEARCH  | SENIOR DIRECTOR FOR COMMS & MKT |          |        |         |         |        | X         |      | 172,591. | 0.        | 36,614. |
| THOMAS COX   | (4) NORA ESRAM                  | 40.00    |        |         |         |        |           |      |          |           |         |
| FINANCE DIRECTOR   | SENIOR DIRECTOR, RESEARCH       |          |        |         |         |        | X         |      | 172,058. | 0.        | 32,817. |
| CORINNE ABBOTT   | (5) THOMAS COX                  | 40.00    |        |         |         |        |           |      |          |           |         |
| DIRECTOR OF DEVELOPMENT  | FINANCE DIRECTOR                |          |        |         |         |        | X         |      | 170,936. | 0.        | 22,503. |
| Columbda   Columbda  | (6) CORINNE ABBOTT              | 40.00    |        |         |         |        |           |      |          |           |         |
| X  | DIRECTOR OF DEVELOPMENT         |          |        |         |         |        | X         |      | 177,292. | 0.        | 13,317. |
| Carrector of Federal Policy  | ,                               | 40.00    |        |         |         |        |           |      |          |           |         |
| DIRECTOR OF FEDERAL POLICY   X   | EXEC DIRECTOR, ASAP             |          |        |         |         | Х      |           |      | 168,120. | 0.        | 11,071. |
| O  | (8) LOWELL UNGAR                | 40.00    | 1      |         |         |        |           |      |          |           |         |
| DIRECTOR   X   | DIRECTOR OF FEDERAL POLICY      |          |        |         |         |        | X         |      | 144,785. | 0.        | 25,088. |
| Column   | (9) SHARYN BARATA               | 2.00     | 1      |         |         |        |           |      |          | _         | _       |
| DIRECTOR   X   | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| Comparison   Com | (10) JANICE BERMAN              | 2.00     | 1      |         |         |        |           |      |          |           |         |
| X  | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| DIRECTOR   | (11) SCOTT BERNSTEIN            | 2.00     | 1      |         |         |        |           |      |          |           |         |
| DIRECTOR   X   | PRESIDENT                       |          | Х      |         | X       |        |           |      | 0.       | 0.        | 0.      |
| Column   C | (12) ROSA CASSIDY               | 2.00     | 1      |         |         |        |           |      |          | _         | _       |
| DIRECTOR   X   | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| Column   | (13) BENJAMIN DE LA PENA        | 2.00     | 1      |         |         |        |           |      |          |           |         |
| DIRECTOR (2/2023 - 6/2023)   X   | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| Column   |                                 | 2.00     | 1      |         |         |        |           |      |          |           |         |
| DIRECTOR         X         0.         0.         0.           (16) MARK JOHNSON         2.00         0.         0.         0.         0.           DIRECTOR         X         0.         0.         0.         0.           (17) MELANIE KENDERDINE         2.00         0.         0.         0.         0.           DIRECTOR         X         0.         0.         0.         0.  | DIRECTOR (2/2023 - 6/2023)      |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| Column   | (15) ROBERT JACKSON             | 2.00     |        |         |         |        |           |      |          |           |         |
| DIRECTOR         X         0.         0.         0.           (17) MELANIE KENDERDINE         2.00         X         0.         0.         0.           DIRECTOR         X         0.         0.         0.         0.   | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
| (17) MELANIE KENDERDINE DIRECTOR  Z.00 X  0. 0.  | (16) MARK JOHNSON               | 2.00     | 1      |         |         |        |           |      |          |           |         |
| DIRECTOR X 0. 0.   | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        | 0.      |
|  | (17) MELANIE KENDERDINE         | 2.00     | 1      |         |         |        |           |      |          |           | _       |
|  | DIRECTOR                        |          | Х      |         |         |        |           |      | 0.       | 0.        |         |

332007 12-21-23

Form 990 (2023)

<u> Page</u> **7** 

| Form 990 (2023) ECONOM                                    | 11                     |                                |   |         |              |                              |        |                                 | 94-2/11                      | /U/ Page 8            |
|---|------------------------|--------------------------------|---|---------|--------------|------------------------------|--------|---------------------------------|------------------------------|-----------------------|
| Part VII Section A. Officers, Directors,                  | Trustees, Key Emp      | oloy                           | ees,                                    | anc     | l Hig        | ghes                         | st Co  | ompensated Employee             | s (continued)                |                       |
| (A)   | (B)                    | (D)                            | (E)                                     | (F)     |              |                              |        |                                 |                              |                       |
| Name and title  | Average                | (do                            | Position<br>(do not check more than one |         |              |                              | nne    | Reportable                      | Reportable                   | Estimated             |
|   | hours per              | box                            | , unles                                 | ss per  | rson i       | is both                      | n an   | compensation                    | compensation                 | amount of             |
|   | week                   |                                | cer an                                  | u a u   | recio        | T                            | iee)   | from                            | from related                 | other                 |
|   | (list any<br>hours for | recto                          |   |         |              |                              |        | the                             | organizations                | compensation          |
|   | related                | or di                          | iee                                     |         |              | sated                        |        | organization<br>(W-2/1099-MISC/ | (W-2/1099-MISC/<br>1099-NEC) | from the organization |
|   | organizations          | ruste                          | l trus                                  |         | ee           | ubeu                         |        | 1099-NEC)                       | 1099-NEC)                    | and related           |
|   | below                  | dual t                         | ıtiona                                  | L       | nploy        | st cor                       | - h    | 1000 (420)                      |                              | organizations         |
|   | line)                  | Individual trustee or director | Institutional trustee                   | Officer | Key employee | Highest compensated employee | Former |                                 |                              | - 5. ga <b>_</b>      |
| (18) VICKI KUO  | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (19) NANETTE LOCKWOOD                                     | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (20) MONICA MARTINEZ                                      | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (21) KATIE MCGINTY  | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (22) PENELOPE MCLEAN-CONNER                               | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| CHAIR   |                        | Х                              |   | Х       |              |                              |        | 0.                              | 0.                           | 0.                    |
| (23) FRANCIS MURRAY, JR.                                  | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (24) MARY ANN PIETTE                                      | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (25) DANIELLE SASS BYRNETT                                | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| (26) SUZANNE SHELTON                                      | 2.00                   |                                |   |         |              |                              |        |                                 |                              |                       |
| DIRECTOR  |                        | Х                              |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| 1b Subtotal   |                        |                                |   |         |              |                              |        | 1,594,201.                      | 0.                           | 198,575.              |
| c Total from continuation sheets to P                     |                        |                                |   |         |              |                              |        | 0.                              | 0.                           | 0.                    |
| d Total (add lines 1b and 1c)                             |                        |                                |   |         |              |                              |        | 1,594,201.                      | 0.                           | 198,575.              |
| <ol><li>Total number of individuals (including)</li></ol> | but not limited to th  | 000                            | lieta                                   | d ah    | OVE          | ) wh                         | o re   | caived more than \$100          | 000 of reportable            |                       |

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

Yes 3 Х

4

line 1a? If "Yes," complete Schedule J for such individual For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on

Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes." complete Schedule J for such person

Section B. Independent Contractors

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)   | (B)                     | (C)          |
|---|-------------------------|--------------|
| Name and business address                   | Description of services | Compensation |
| BOUNDARY STONE PARTNERS LLC, 1744           |                         |              |
| KILBOURNE PLCE NW, WASHINGTON, DC 20010     | STRATEGIC ADVISOR       | 200,000.     |
| EMERALD CITIES COLLABORATIVE                |                         |              |
| 1660 L ST NW, STE 204, WASHINGTON, DC 20036 | PROJECT RESEARCH        | 143,738.     |
| HR&A INC., 99 HUDSON STREET, 3RD FLOOR,     |                         |              |
| NEW YORK, NY 10013                          | ADVISORY SERVICES       | 141,511.     |
| SCURRY STREET MEETING MANAGEMENT LLC,       | MEETING/EVENT           |              |
| 11450 US HIGHWAY 380, SUITE 130-223, CITY   | MANAGEMENT              | 106,545.     |
|   |                         |              |
|   |                         |              |

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

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2023)

Form 990 ECONOMY 94-2711707

| Part VII Section A. Officers, Directors, Tr | ustees Kev Fr   | nnlo                           | VEE                   | s ar    | nd H          | liah                         | est (  | Compensated Employe                            | PPS (continued)                                  |   |
|---|---|--------------------------------|-----------------------|---------|---------------|------------------------------|--------|--|--|---|
| (A)   | (B)   | IIPIO                          | yee                   |         | C)            | iigiii                       | 231 (  | (D)  | (E)  | (F)   |
| Name and title                              | Average hours   | (cl                            |                       | Pos     | ition<br>that |                              | ly)    | Reportable compensation                        | Reportable compensation                          | Estimated<br>amount of  |
|   | per<br>week<br>(list any<br>hours for<br>related<br>organizations<br>below<br>line) | Individual trustee or director | Institutional trustee | Officer | Key employee  | Highest compensated employee | Former | from<br>the<br>organization<br>(W-2/1099-MISC) | from related<br>organizations<br>(W-2/1099-MISC) | other<br>compensation<br>from the<br>organization<br>and related<br>organizations |
| (27) MITCHELL B. SIMPSON, JR.<br>SECRETARY  | 2.00  | Х                              |                       | Х       |               |                              |        | 0.   | 0.   | 0   |
| (28) SUSAN E. STRATTON<br>PREASURER         | 2.00  | Х                              |                       | Х       |               |                              |        | 0.   | 0.   | 0   |
| 29) HARRIET TREGONING DIRECTOR              | 2.00  | х                              |                       |         |               |                              |        | 0.   | 0.   | 0   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |
|   |   |                                |                       |         |               |                              |        |  |  |   |

Page 9

Part VIII Statement of Revenue Check if Schedule O contains a response or note to any line in this Part VIII (B) (C) Revenue excluded Total revenue Related or exempt Unrelated from tax under function revenue business revenue sections 512 - 514 Contributions, Gifts, Grants and Other Similar Amounts 1a **1 a** Federated campaigns 1b **b** Membership dues c Fundraising events 1c d Related organizations 1d 1,231,325. e Government grants (contributions) 1e f All other contributions, gifts, grants, and similar amounts not included above ... 7,733,107. 1f g Noncash contributions included in lines 1a-1f 8,964,432. h Total. Add lines 1a-1f **Business Code** 2 a CONTRACTS 900099 2,115,911. 2,115,911 Program Service Revenue CONFERENCE REVENUE 900099 1,776,173 1,776,173 c ALLY PROGRAM 900099 735,981. 735,981. d f All other program service revenue ..... 4,628,065. g Total. Add lines 2a-2f Investment income (including dividends, interest, and 134,334. 134,334 other similar amounts) Income from investment of tax-exempt bond proceeds 5 Royalties ..... (i) Real (ii) Personal 6 a Gross rents 6b **b** Less: rental expenses ... c Rental income or (loss) d Net rental income or (loss) (i) Securities (ii) Other 7 a Gross amount from sales of assets other than inventory 7a **b** Less: cost or other basis and sales expenses 7b Other Revenue 7с c Gain or (loss) d Net gain or (loss) 8 a Gross income from fundraising events (not including \$ contributions reported on line 1c). See Part IV, line 18 **b** Less: direct expenses c Net income or (loss) from fundraising events 9 a Gross income from gaming activities. See Part IV, line 19 **b** Less: direct expenses 9b c Net income or (loss) from gaming activities 10 a Gross sales of inventory, less returns 10a and allowances **b** Less: cost of goods sold c Net income or (loss) from sales of inventory **Business Code** 11 a MISCELLANOUS INCOME 900099 30,233 30,233, b d All other revenue 30,233 e Total. Add lines 11a-11d 13,757,064. 134,334. 4,658,298. Total revenue. See instructions 12

# Form 990 (2023) ECONOMY Part IX Statement of Functional Expenses

|    | Check if Schedule O contains a respons  |                       |                                     |                                     | X                                     |
|----|---|-----------------------|-------------------------------------|-------------------------------------|---------------------------------------|
|    | not include amounts reported on lines 6b,<br>8b, 9b, and 10b of Part VIII.  | (A)<br>Total expenses | <b>(B)</b> Program service expenses | (C) Management and general expenses | <b>(D)</b><br>Fundraising<br>expenses |
| 1  | Grants and other assistance to domestic organizations   |                       |                                     |                                     |                                       |
|    | and domestic governments. See Part IV, line 21  |                       |                                     |                                     |                                       |
| 2  | Grants and other assistance to domestic   |                       |                                     |                                     |                                       |
| _  | individuals. See Part IV, line 22   |                       |                                     |                                     |                                       |
| 3  | Grants and other assistance to foreign  |                       |                                     |                                     |                                       |
|    | organizations, foreign governments, and foreign   | 290,000.              | 290,000.                            |                                     |                                       |
|    | individuals. See Part IV, lines 15 and 16   | 230,000.              | 290,000.                            |                                     |                                       |
| 4  | Benefits paid to or for members   |                       |                                     |                                     |                                       |
| 5  | Compensation of current officers, directors, trustees, and key employees  | 824,775.              | 482,529.                            | 303,511.                            | 38,735                                |
| 6  | Compensation not included above to disqualified   | 024,775               | 402,323.                            | 303,311.                            | 30,733                                |
| U  | persons (as defined under section 4958(f)(1)) and   |                       |                                     |                                     |                                       |
|    |   |                       |                                     |                                     |                                       |
| 7  | Other salaries and wages  | 5,617,333.            | 4,394,710.                          | 1,045,041.                          | 177,582                               |
| 8  | Pension plan accruals and contributions (include  | 0,02.,000.            |                                     |                                     |                                       |
| Ū  | section 401(k) and 403(b) employer contributions)   | 387,709.              | 301,169.                            | 74,050.                             | 12,490                                |
| 9  | Other employee benefits   | 1,968,510.            | 1,499,295.                          | 404,159.                            | 12,490<br>65,056                      |
| 10 | Payroll taxes   | 563,929.              | 428,008.                            | 117,086.                            | 18,835                                |
| 11 | Fees for services (nonemployees):   | •                     | ,                                   | ,                                   | •                                     |
| а  | Management  |                       |                                     |                                     |                                       |
|    | Legal   | 32,786.               | 5,505.                              | 27,281.                             |                                       |
|    | Accounting  | 30,323.               |                                     | 30,323.                             |                                       |
|    | Lobbying  |                       |                                     |                                     |                                       |
|    | Professional fundraising services. See Part IV, line 17   |                       |                                     |                                     |                                       |
| f  | Investment management fees  |                       |                                     |                                     |                                       |
| g  | Other. (If line 11g amount exceeds 10% of line 25,  |                       |                                     |                                     |                                       |
|    | column (A), amount, list line 11g expenses on Sch O.)   | 2,046,373.            | 1,884,673.                          | 155,413.                            | 6,287                                 |
| 12 | Advertising and promotion   |                       |                                     |                                     |                                       |
| 13 | Office expenses   | 253,266.              | 157,335.                            | 90,392.                             | 5,539                                 |
| 14 | Information technology  |                       |                                     |                                     |                                       |
| 15 | Royalties   |                       | 510.050                             | 100 500                             |                                       |
| 16 | Occupancy   | 658,607.              | 513,260.                            | 122,703.                            | 22,644                                |
| 17 | Travel  | 177,670.              | 148,453.                            | 24,353.                             | 4,864                                 |
| 18 | Payments of travel or entertainment expenses  |                       |                                     |                                     |                                       |
|    | for any federal, state, or local public officials   | 070 671               | 004 464                             | FO 147                              | 10 000                                |
| 19 | Conferences, conventions, and meetings  | 872,671.              | 804,464.                            | 58,147.                             | 10,060                                |
| 20 | Interest  |                       |                                     |                                     |                                       |
| 21 | Payments to affiliates  | 114,727.              | 87,242.                             | 23 646                              | 2 020                                 |
| 22 | Depreciation, depletion, and amortization   | 20,198.               | 01,242.                             | 23,646.                             | 3,839                                 |
| 23 | Other expanses, Itamiza expanses not severed  | 40,130.               |                                     | 40,130.                             |                                       |
| 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 0.) |                       |                                     |                                     |                                       |
| а  | OMITED EXPENSES   | 72,409.               | 16,653.                             | 55,346.                             | 410                                   |
| b  | BANK CHARGES  | 17,378.               | 4,731.                              | 10,743.                             | 1,904                                 |
| c  |   | •                     |                                     | ,                                   | •                                     |
| d  |   |                       |                                     |                                     |                                       |
|    | All other expenses  |                       |                                     |                                     |                                       |
| 25 | Total functional expenses. Add lines 1 through 24e  | 13,948,664.           | 11,018,027.                         | 2,562,392.                          | 368,245                               |
| 26 | Joint costs. Complete this line only if the organization  |                       |                                     |                                     |                                       |
|    | reported in column (B) joint costs from a combined  |                       |                                     |                                     |                                       |
|    | educational campaign and fundraising solicitation.  |                       |                                     |                                     |                                       |
|    | Check here if following SOP 98-2 (ASC 958-720)  |                       |                                     |                                     |                                       |

Form **990** (2023)

Form 990 (2023)
Part X Balance Sheet

| Par                         | ťΧ  | Balance Sneet  |           |                       |                                 |    |                           |
|-----------------------------|-----|--|-----------|-----------------------|---------------------------------|----|---------------------------|
|                             |     | Check if Schedule O contains a response or not                     | e to any  | / line in this Part X |                                 |    |                           |
|                             |     |  |           |                       | <b>(A)</b><br>Beginning of year |    | <b>(B)</b><br>End of year |
|                             | 1   | Cash - non-interest-bearing  |           |                       | 628,043.                        | 1  | 446,080                   |
|                             | 2   | Savings and temporary cash investments                             |           |                       |                                 | 2  |                           |
|                             | 3   | Pledges and grants receivable, net                                 |           |                       |                                 | 3  |                           |
|                             | 4   | Accounts receivable, net   |           |                       | 1,586,861.                      | 4  | 3,489,177                 |
|                             | 5   | Loans and other receivables from any current or                    |           |                       |                                 |    |                           |
|                             |     | trustee, key employee, creator or founder, subst                   | antial c  | ontributor, or 35%    |                                 |    |                           |
|                             |     | controlled entity or family member of any of thes                  | se perso  | ons                   |                                 | 5  |                           |
|                             | 6   | Loans and other receivables from other disquality                  | -         |                       |                                 |    |                           |
|                             |     | under section 4958(f)(1)), and persons described                   | l in sect | tion 4958(c)(3)(B)    |                                 | 6  |                           |
| 2                           | 7   | Notes and loans receivable, net                                    |           |                       |                                 | 7  |                           |
| Assets                      | 8   | Inventories for sale or use  |           |                       |                                 | 8  |                           |
| ₹                           | 9   | Prepaid expenses and deferred charges                              |           |                       | 99,372.                         | 9  | 220,655                   |
|                             | 10a | Land, buildings, and equipment: cost or other                      |           |                       |                                 |    |                           |
|                             |     | basis. Complete Part VI of Schedule D                              |           | 1,340,004.            |                                 |    |                           |
|                             | b   | Less: accumulated depreciation                                     |           | 491,990.              | 915,844.                        |    | 848,014                   |
|                             | 11  | Investments - publicly traded securities                           |           |                       | 9,938,707.                      | 11 | 9,833,135                 |
|                             | 12  | Investments - other securities. See Part IV, line 1                | 1         |                       |                                 | 12 |                           |
|                             | 13  | Investments - program-related. See Part IV, line                   |           |                       |                                 | 13 |                           |
|                             | 14  | Intangible assets  |           |                       | - 100 010                       | 14 |                           |
|                             | 15  | Other assets. See Part IV, line 11                                 |           |                       | 5,403,843.                      | 15 | 4,891,994                 |
|                             | 16  | Total assets. Add lines 1 through 15 (must equal line 33)          |           |                       | 18,572,670.                     | 16 | 19,729,055                |
|                             | 17  | Accounts payable and accrued expenses                              |           |                       | 900,449.                        | 17 | 1,025,079                 |
|                             | 18  | Grants payable   |           |                       | 650 556                         | 18 | 1 264 850                 |
|                             | 19  | Deferred revenue   |           |                       | 658,556.                        | 19 | 1,364,758                 |
|                             | 20  | Tax-exempt bond liabilities  |           |                       | 126 527                         | 20 | 127 105                   |
|                             | 21  | Escrow or custodial account liability. Complete I                  |           |                       | 136,527.                        | 21 | 137,185                   |
| es                          | 22  | Loans and other payables to any current or form                    |           |                       |                                 |    |                           |
| ≣                           |     | trustee, key employee, creator or founder, subst                   |           |                       |                                 |    |                           |
| Liabilities                 |     | controlled entity or family member of any of thes                  |           |                       |                                 | 22 |                           |
| _                           | 23  | Secured mortgages and notes payable to unrela                      |           |                       |                                 | 23 |                           |
|                             | 24  | Unsecured notes and loans payable to unrelated                     |           |                       |                                 | 24 |                           |
|                             | 25  | Other liabilities (including federal income tax, pa                | -         |                       |                                 |    |                           |
|                             |     | parties, and other liabilities not included on lines of Schedule D | 17-24).   | . Complete Part X     | 6,967,966.                      | 25 | 6,369,483                 |
|                             | 26  | Total liabilities. Add lines 17 through 25                         |           |                       | 8,663,498.                      | 26 | 8,896,505                 |
| _                           | 20  | Organizations that follow FASB ASC 958, che                        |           |                       | 0,000,400.                      | 20 | 0,030,303                 |
| န္                          |     | and complete lines 27, 28, 32, and 33.                             | CK HEIG   |                       |                                 |    |                           |
| ا <u>څ</u>                  | 27  |  |           |                       | 4,715,888.                      | 27 | 5,769,836                 |
| 33                          | 28  | Net assets with donor restrictions                                 |           |                       | 5,193,284.                      | 28 | 5,062,714                 |
| <u> </u>                    |     | Organizations that do not follow FASB ASC 9                        |           |                       | 0,200,2021                      |    | <u> </u>                  |
| ᆵ                           |     | and complete lines 29 through 33.                                  |           |                       |                                 |    |                           |
| ō                           | 29  | Capital stock or trust principal, or current funds                 |           |                       |                                 | 29 |                           |
| ets                         | 30  | Paid-in or capital surplus, or land, building, or ed               |           |                       |                                 | 30 |                           |
| Ass                         | 31  | Retained earnings, endowment, accumulated in                       |           |                       |                                 | 31 |                           |
| Net Assets or Fund Balances | 32  | Total net assets or fund balances                                  |           |                       | 9,909,172.                      | 32 | 10,832,550                |
| z                           | 33  |  |           |                       | 18,572,670.                     | 33 | 19,729,055                |

| Pa | TEXT RECONCILIATION OF NET ASSETS   |          |         |              |       |        |
|----|---|----------|---------|--------------|-------|--------|
|    | Check if Schedule O contains a response or note to any line in this Part XI   |          | <u></u> |              |       |        |
|    |   |          |         |              |       |        |
| 1  | Total revenue (must equal Part VIII, column (A), line 12)   | 1        |         | <u>, 75'</u> |       |        |
| 2  | Total expenses (must equal Part IX, column (A), line 25)  | 2        |         | ,94          |       |        |
| 3  | Revenue less expenses. Subtract line 2 from line 1  | 3        |         | <u>-19</u>   | 1,6   | 00.    |
| 4  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                             | 4        | 9       | ,90          | 9,1'  | 72.    |
| 5  | Net unrealized gains (losses) on investments  | 5        | 1       | ,11          | 4,9'  | 78.    |
| 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        |         |              |       | 0.     |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32,                    |          |         |              |       |        |
|    | column (B))   | 10       | 10      | ,83          | 2,5   | 50.    |
| Pa | rt XII Financial Statements and Reporting   |          |         |              |       |        |
|    | Check if Schedule O contains a response or note to any line in this Part XII  |          | <u></u> |              |       | X      |
|    |   |          |         |              | Yes   | No     |
| 1  | Accounting method used to prepare the Form 990: Cash X Accrual Other  |          |         |              |       |        |
|    | If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.     |          |         |              |       |        |
| 2a | 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:  |          |         |              |       |        |
|    | Separate basis Consolidated basis Both consolidated and separate basis  |          |         |              |       |        |
| b  | Were the organization's financial statements audited by an independent accountant?                                    |          |         | 2b           | X     |        |
|    | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate      | basis,   |         |              |       |        |
|    | consolidated basis, or both:  |          |         |              |       |        |
|    | X Separate basis Consolidated basis Both consolidated and separate basis  |          |         |              |       |        |
| С  | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the    | audit,   |         |              |       |        |
|    | review, or compilation of its financial statements and selection of an independent accountant?                        |          |         | 2c           | X     |        |
|    | If the organization changed either its oversight process or selection process during the tax year, explain on Sche    | edule O. |         |              |       |        |
| За | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the       |          |         |              |       |        |
|    | Uniform Guidance, 2 C.F.R. Part 200, Subpart F?   |          |         | 3a           | X     |        |
| b  | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required |          |         |              |       |        |
|    | or audits, explain why on Schedule O and describe any steps taken to undergo such audits                              |          |         | 3b           | Х     |        |
|    |   |          |         | Form         | 990 ( | (2023) |

#### **SCHEDULE A**

(Form 990)

Total

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

Open to Public Inspection

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT **Employer identification number** Name of the organization **ECONOMY** 94-2711707 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.) A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). 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). 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: 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). X 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.) A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) 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 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from 10 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.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 11 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. 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. 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. 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. 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. 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. Enter the number of supported organizations Provide the following information about the supported organization(s). (iv) Is the organization listed (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other in your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) Yes above (see instructions))

# 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.)

| Sec  | tion A. Public Support  |                       |                     |                        |                      |                    |           |
|------|---|-----------------------|---------------------|------------------------|----------------------|--------------------|-----------|
| Cale | ndar year (or fiscal year beginning in)   | (a) 2019              | <b>(b)</b> 2020     | (c) 2021               | (d) 2022             | (e) 2023           | (f) Total |
| 1    | Gifts, grants, contributions, and   |                       |                     |                        |                      |                    |           |
|      | membership fees received. (Do not   |                       |                     |                        |                      |                    |           |
|      | include any "unusual grants.")  | 6564947.              | 6260957.            | 10972804.              | 6399740.             | 8964432.           | 39162880. |
| 2    | Tax revenues levied for the organ-  |                       |                     |                        |                      |                    |           |
|      | ization'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  | 6564947.              | 6260957.            | 10972804.              | 6399740.             | 8964432.           | 39162880. |
| 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)  |                       |                     |                        |                      |                    | 9181604.  |
| 6    | Public support. Subtract line 5 from line 4.  |                       |                     |                        |                      |                    | 29981276. |
| Sec  | tion B. Total Support   |                       |                     |                        |                      |                    |           |
| Cale | ndar year (or fiscal year beginning in)   | (a) 2019              | <b>(b)</b> 2020     | (c) 2021               | (d) 2022             | (e) 2023           | (f) Total |
| 7    | Amounts from line 4   | 6564947.              | 6260957.            | 10972804.              | 6399740.             | 8964432.           | 39162880. |
| 8    | Gross income from interest,   |                       |                     |                        |                      |                    |           |
|      | dividends, payments received on   |                       |                     |                        |                      |                    |           |
|      | securities loans, rents, royalties,   |                       |                     |                        |                      |                    |           |
|      | and income from similar sources   | 210,879.              | 208,488.            | 282,173.               | 259,018.             | 134,334.           | 1094892.  |
| 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.)  | 11,454.               | 4,869.              | -137.                  | 2,410.               | 30,233.            |           |
| 11   | <b>Total support.</b> Add lines 7 through 10  |                       |                     |                        |                      |                    | 40306601. |
| 12   | Gross receipts from related activities,   | etc. (see instructio  | ns)                 |                        |                      | 12                 |           |
| 13   | First 5 years. If the Form 990 is for the   | ne organization's fir | st, second, third,  | fourth, or fifth tax y | ear as a section 50  | 01(c)(3)           |           |
|      | organization, check this box and stop   |                       |                     |                        |                      |                    |           |
|      | tion C. Computation of Publi  |                       |                     |                        |                      |                    |           |
|      | Public support percentage for 2023 (li  |                       |                     |                        |                      | 14                 | 74.38 %   |
|      | Public support percentage from 2022   |                       |                     |                        |                      | 15                 | 70.12 %   |
| 16a  | 33 1/3% support test - 2023. If the o   |                       |                     |                        |                      |                    |           |
|      | stop here. The organization qualifies as a publicly supported organization  |                       |                     |                        |                      |                    |           |
| b    | 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  |                       |                     |                        |                      |                    |           |
| 17a  | 7a 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                                   |                       |                     |                        |                      |                    |           |
| b    | 10% -facts-and-circumstances test   | - 2022. If the orga   | anization did not d | check a box on line    | e 13, 16a, 16b, or 1 | 7a, and line 15 is | 10% or    |
|      | more, and if the organization meets the   | ne facts-and-circum   | stances test, che   | ck this box and st     | op here. Explain ir  | Part VI how the    |           |
|      | organization meets the facts-and-circu  | umstances test. Th    | e organization qua  | alifies as a publicly  | supported organiz    | ation              |           |
| 18   | Private foundation. If the organization   | n did not check a b   | oox on line 13, 16  | a, 16b, 17a, or 17b    | , check this box ar  | nd see instruction | s         |

Schedule A (Form 990) 2023

ECONOMY

94-2711707 Page 3

# 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.)

| (a) 2019            | <b>(b)</b> 2020  | (c) 2021   | (d) 2022   | (e) 2023   | (f) Total  |
|---------------------|--|--|--|--|--|
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|                     |  |  |  |  |  |
| (a) 2019            | <b>(b)</b> 2020  | (c) 2021   | (d) 2022   | (e) 2023   | (f) Total  |
| (4) = 0 : 0         | (3) 2323   | (6) 252 :  | (4,) = 3 = 2   | (0) = 0 = 0  | (1) 1010   |
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| e organization's fi | rst, second, third,  | fourth, or fifth tax   | year as a section 5  | 501(c)(3) organization   | on,  |
| <u></u>             | <u></u>  | ·····  | <u></u>  |  |  |
| Support Per         | centage  |  |  |  |  |
| ne 8, column (f), d | livided by line 13, o  | column (f))  |  | 15   |  |
| Schedule A, Part    | III, line 15   |  |  | 16   |  |
|                     |  |  |  |  |  |
| 23 (line 10c, colur | nn (f), divided by li  | ne 13, column (f))   |  | 17   |  |
| 2022 Schedule A,    | Part III, line 17  |  |  | 18   |  |
| organization did r  |  |  |  | 33 1/3%, and line 1  | 7 is not   |
|                     |  |  |  |  |  |
| organization did n  | ot check a box on  | line 14 or line 19a  | a, and line 16 is m  | ore than 33 1/3%, a  |  |
|                     |  |  |  |  |  |
|                     | (a) 2019  (a) 2019  (a) 2019  (b) Comport Perme 8, column (f), do Schedule A, Part trment Income 23 (line 10c, column 22 Schedule A, organization did red stop here. The organization did red stop here and stop here. The organization did red stop here and stop here. The organization did red stop here and stop here. The organization did red stop here and stop here. | (a) 2019 (b) 2020  (a) 2019 (b) 2020  (b) 2020  (c) Support Percentage  (c) Support Percentage  (c) Schedule A, Part III, line 15  (c) Iment Income Percentage  (c) Golumn (f), divided by line 13, companization did not check the box of the stop here. The organization quality organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and stop here. The organization did not check a box on the sk this box and | e organization's first, second, third, fourth, or fifth tax  e Support Percentage  ne 8, column (f), divided by line 13, column (f))  Schedule A, Part III, line 15  Iment Income Percentage  23 (line 10c, column (f), divided by line 13, column (f))  1022 Schedule A, Part III, line 17  organization did not check the box on line 14, and line d stop here. The organization qualifies as a publicly sorganization did not check a box on line 14 or line 19a ck this box and stop here. The organization qualifies as | e organization's first, second, third, fourth, or fifth tax year as a section of the second of the s | (a) 2019 (b) 2020 (c) 2021 (d) 2022 (e) 2023  e organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization are second as a section 501(c)(3) organization as a section 501(c)(3) organization are second as a section 501(c) |

**ECONOMY** 

# 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

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

|             | Yes    | No   |
|-------------|--------|------|
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| 104         |        |      |
| 10b         |        |      |
| ule A (Forn | n 990) | 2023 |

94-2711707 Page 4

94-2711707 Page 5

| Pai | art IV Supporting Organizations (continued)   |                         |      |     |
|-----|---|-------------------------|------|-----|
| `   |   |                         | Yes  | No  |
| 11  | Has the organization accepted a gift or contribution from any of the following persons?                                 |                         |      |     |
| а   | <b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and |                         |      |     |
|     | 11c below, the governing body of a supported organization?  | 11a                     |      |     |
| h   | b A family member of a person described on line 11a above?  | 11b                     |      |     |
|     | c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide    |                         |      |     |
| ŭ   | detail in Part VI.  | 11c                     |      |     |
| Sec | ection B. Type I Supporting Organizations   |                         |      |     |
|     | 71 11 0 0   |                         | Yes  | No  |
| 1   | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of     | of one or               | 103  | 140 |
| •   | more supported organizations have the power to regularly appoint or elect at least a majority of the organization's     |                         |      |     |
|     | directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization    |                         |      |     |
|     | effectively operated, supervised, or controlled the organization's activities. If the organization had more than one su | upported                |      |     |
|     | organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated amo      | ong the                 |      |     |
| •   | supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.        | -                       |      |     |
| 2   | 7 11 0  |                         |      |     |
|     | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in              |                         |      |     |
|     | Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,             | 2                       |      |     |
| Sec | supervised, or controlled the supporting organization.  |                         |      | l   |
|     |   |                         | Yes  | No  |
| 1   | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors        |                         | 163  | 140 |
| •   | or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control    |                         |      |     |
|     | or management of the supporting organization was vested in the same persons that controlled or managed                  |                         |      |     |
|     | the supported organization(s).  | 1                       |      |     |
| Sec | ction D. All Type III Supporting Organizations  |                         |      |     |
|     | , , , , , , , , , , , , , , , , , , ,   |                         | Yes  | No  |
| 1   | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the          |                         | 100  | 110 |
| •   | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax   | v                       |      |     |
|     | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the  |                         |      |     |
|     | organization's governing documents in effect on the date of notification, to the extent not previously provided?        | 1                       |      |     |
| 2   |   |                         |      |     |
| _   | organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how      |                         |      |     |
|     | the organization maintained a close and continuous working relationship with the supported organization(s).             | 2                       |      |     |
| 3   |   |                         |      |     |
| Ū   | significant voice in the organization's investment policies and in directing the use of the organization's              |                         |      |     |
|     | income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's     |                         |      |     |
|     | supported organizations played in this regard.  | 3                       |      |     |
| Sec | ection E. Type III Functionally Integrated Supporting Organizations   |                         | 1    | I   |
| 1   | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see i    | nstructions).           |      |     |
| а   |   | ,                       |      |     |
| b   | . 🗔 🗕   |                         |      |     |
| С   |   | entity (see instruction | ns). |     |
| 2   |   |                         | Yes  | No  |
| а   | a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of    |                         |      |     |
|     | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify              |                         |      |     |
|     | those supported organizations and explain how these activities directly furthered their exempt purposes,                |                         |      |     |
|     | how the organization was responsive to those supported organizations, and how the organization determined               |                         |      |     |
|     | that these activities constituted substantially all of its activities.  | 2a                      |      |     |
| b   |   |                         |      |     |
|     | one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in            |                         |      |     |
|     | Part VI the reasons for the organization's position that its supported organization(s) would have engaged in            |                         |      |     |
|     | these activities but for the organization's involvement.  | 2b                      |      |     |
| 3   |   |                         |      |     |
| а   | a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or           |                         |      |     |
|     | trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI.                           | 3a                      |      |     |
| b   |   |                         |      |     |
|     | of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.       | 3b                      |      |     |
|     |   |                         |      |     |

Schedule A (Form 990) 2023

**ECONOMY** 

94-2711707 Page 6

| Pai  | Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations  |           |                              |                                |  |  |  |
|------|---|-----------|------------------------------|--------------------------------|--|--|--|
| 1    | 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.                                       |           |                              |                                |  |  |  |
| Sect | ion A - Adjusted Net Income   |           | (A) Prior Year               | (B) Current Year<br>(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         |                              |                                |  |  |  |
| Sect | ion B - Minimum Asset Amount  |           | (A) Prior Year               | (B) Current Year<br>(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):   |           |                              |                                |  |  |  |
| а    | Average monthly value of securities   | 1a        |                              |                                |  |  |  |
| b    | Average monthly cash balances   | 1b        |                              |                                |  |  |  |
| С    | Fair market value of other non-exempt-use assets  | 1c        |                              |                                |  |  |  |
| d    | Total (add lines 1a, 1b, and 1c)  | 1d        |                              |                                |  |  |  |
| е    | 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         |                              |                                |  |  |  |
| Sect | ion C - Distributable Amount  |           |                              | Current Year                   |  |  |  |
| _1   | Adjusted net income for prior year (from Section A, line 8, column A)   | 1         |                              |                                |  |  |  |
| 2    | Enter 0.85 of line 1.   | 2         |                              |                                |  |  |  |
| 3    | Minimum asset amount for prior year (from Section B, line 8, column A)  | 3         |                              |                                |  |  |  |
| 4    | Enter greater of line 2 or line 3.  | 4         |                              |                                |  |  |  |
| 5    | Income tax imposed in prior year  | 5         |                              |                                |  |  |  |
| 6    | Distributable Amount. Subtract line 5 from line 4, unless subject to  |           |                              |                                |  |  |  |
|      | emergency temporary reduction (see instructions).   | 6         |                              |                                |  |  |  |
| 7    | Check here if the current year is the organization's first as a non-functionall   | y integra | ted Type III supporting orga | nization (see                  |  |  |  |
|      | instructions).  |           |                              |                                |  |  |  |

| Par     | t V Type III Non-Functionally Integrated 50                  | 09(a)(3) Supporting Orga         | nizations (continued)          |                                  |
|---------|--|----------------------------------|--------------------------------|----------------------------------|
| Section | on D - Distributions   |                                  |                                | Current Year                     |
| 1       | Amounts paid to supported organizations to accomplish e      | exempt purposes                  | 1                              |                                  |
| 2       | Amounts paid to perform activity that directly furthers exe  | mpt purposes of supported        |                                |                                  |
|         | organizations, in excess of income from activity             |                                  | 2                              |                                  |
| 3       | Administrative expenses paid to accomplish exempt purpo      | oses of supported organizations  | 3                              |                                  |
| 4       | Amounts paid to acquire exempt-use assets                    |                                  | 4                              |                                  |
|         | Qualified set-aside amounts (prior IRS approval required -   | provide details in Part VI)      | 5                              |                                  |
|         | Other distributions (describe in Part VI). See instructions. |                                  | 6                              |                                  |
|         | Total annual distributions. Add lines 1 through 6.           |                                  | 7                              |                                  |
|         | Distributions to attentive supported organizations to which  | h the organization is responsive |                                |                                  |
|         | (provide details in Part VI). See instructions.              |                                  | 8                              |                                  |
| 9       | Distributable amount for 2023 from Section C, line 6         |                                  | 9                              |                                  |
|         | Line 8 amount divided by line 9 amount                       |                                  | 10                             |                                  |
|         |  | (i)                              | (ii)                           | (iii)                            |
| Section | on E - Distribution Allocations (see instructions)           | Excess Distributions             | Underdistributions<br>Pre-2023 | Distributable<br>Amount for 2023 |
| _1_     | Distributable amount for 2023 from Section C, line 6         |                                  |                                |                                  |
| 2       | Underdistributions, if any, for years prior to 2023 (reason- |                                  |                                |                                  |
|         | able cause required - explain in Part VI). See instructions. |                                  |                                |                                  |
| 3       | Excess distributions carryover, if any, to 2023              |                                  |                                |                                  |
| а       | From 2018  |                                  |                                |                                  |
| b       | From 2019  |                                  |                                |                                  |
| С       | From 2020  |                                  |                                |                                  |
| d       | From 2021  |                                  |                                |                                  |
| е       | 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                 |                                  |                                |                                  |
|         | Applied to 2023 distributable amount                         |                                  |                                |                                  |
| С       | Remainder. Subtract lines 4a and 4b from line 4.             |                                  |                                |                                  |
|         | Remaining underdistributions for years prior to 2023, if     |                                  |                                |                                  |
|         | any. Subtract lines 3g and 4a from line 2. For result greate | er                               |                                |                                  |
|         | than zero, explain in <b>Part VI.</b> See instructions.      |                                  |                                |                                  |
|         | 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:   |                                  |                                |                                  |
|         | Excess from 2019   |                                  |                                |                                  |
|         | Excess from 2020   |                                  |                                |                                  |
|         | Excess from 2021   |                                  |                                |                                  |
|         | Excess from 2022   |                                  |                                |                                  |
|         | Excess from 2023   |                                  |                                |                                  |

# AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

| Supplemental Information: Provide the explanations required by Part II, line 10, Part III, line 172 or 170. Part III, line 12.  Part IV, Section D, lines 2, 96, 36, 46, 56, 68, 98, 99, 91, 11, 15, and 110; Part IV, Section B, line 18, Part IV, Section D, lines 2, 96, 28, 46, 56, 68, 98, 99, 11, 115, and 110; Part IV, Section B, line 18, Part IV, Section B, line 19, Part IV, Section B, line 18, Part IV, Section B, line 19, Part IV, Section B, line | Schedule A | (Form 990) 2023  | ECONOMY  |  |   | 94-2711707 Page 8   |
|---|------------|--|--|--|---|---|
| (See instructions.)   | Part VI    | Supplemental Information Part IV, Section A, lines 1 line 1; Part IV, Section D, | <b>mation.</b> Provide the 1, 2, 3b, 3c, 4b, 4c, 5a, 6 lines 2 and 3; Part IV, S | 5, 9a, 9b, 9c, 11a, 11b,<br>Section E, lines 1c, 2a, 2 | and 11c; Part IV, Section B, line<br>2b, 3a, and 3b; Part V, line 1; Pa | a or 17b; Part III, line 12;<br>es 1 and 2; Part IV, Section C,<br>art V, Section B, line 1e; Part V, |
|   |            | (See instructions.)  | · · ·  |  |   |   |
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# Schedule B

(Form 990)

Department of the Treasury Internal Revenue Service

# **Schedule of Contributors**

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

OMB No. 1545-0047

2023

Name of the organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT ECONOMY

Employer identification number

94-2711707

| Organization type (check one):  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|
| Filers of:  | Section:   |  |  |  |  |  |
| Form 990 or 990-  | EZ X 501(c)( 3 ) (enter number) organization   |  |  |  |  |  |
|   | 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation   |  |  |  |  |  |
|   | 527 political organization   |  |  |  |  |  |
| Form 990-PF   | 501(c)(3) exempt private foundation  |  |  |  |  |  |
|   | 4947(a)(1) nonexempt charitable trust treated as a private foundation  |  |  |  |  |  |
|   | 501(c)(3) taxable private foundation   |  |  |  |  |  |
|   | panization is covered by the <b>General Rule</b> or a <b>Special Rule</b> . tion 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.  |  |  |  |  |  |
| General Rule  |  |  |  |  |  |  |
|   | organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or y) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.  |  |  |  |  |  |
| Special Rules   |  |  |  |  |  |  |
| sections<br>contribu  | X For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.   |  |  |  |  |  |
| For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III. |  |  |  |  |  |  |
| year, co<br>is check<br>purpose   | For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the <b>General Rule</b> applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year \$ |  |  |  |  |  |
| Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).  |  |  |  |  |  |  |

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

Schedule B (Form 990) (2023)

Name of organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

ECONOMY

Employer identification number

94-2711707

| Part I     | Contributors (see instructions). Use duplicate copies of Part I if additional | I space is needed.      |  |
|------------|---|-------------------------|--|
| (a)        | (b)   | (c)                     | (d)  |
| No.        | Name, address, and ZIP + 4  | Total contributions     | Type of contribution   |
| 1          |   | \$\$                    | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions | (d) Type of contribution   |
| 2          | Nume, dudiess, and Eli + 4  | \$800,000.              | Person X Payroll Noncash (Complete Part II for noncash contributions.)   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c) Total contributions | (d) Type of contribution   |
| 3          |   | \$680,861.              | Person X Payroll Noncash (Complete Part II for noncash contributions.)   |
| (a)        | (b)   | (c)                     | (d)  |
| No. 4      | Name, address, and ZIP + 4  | \$ 565,000.             | Person X Payroll Noncash (Complete Part II for noncash contributions.)   |
| (a)        | (b)   | (c)                     | (d)  |
| No. 5      | Name, address, and ZIP + 4  | \$ 500,000.             | Person X Payroll  Noncash  (Complete Part II for noncash contributions.) |
| (a)        | (b) Name address and ZID + 4  | (c)                     | (d)  |
| No. 6      | Name, address, and ZIP + 4  | \$ 480,000.             | Person X Payroll Noncash (Complete Part II for noncash contributions.)   |

Name of organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

ECONOMY

Employer identification number

94-2711707

| Part I     | <b>Contributors</b> (see instructions). Use duplicate copies of Part I if additional | al space is needed.        |  |
|------------|--|----------------------------|--|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c)<br>Total contributions | (d) Type of contribution   |
| 7          |  | \$ 420,000.                | Person X Payroll  Noncash  (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c) Total contributions    | (d) Type of contribution   |
| 8          |  | \$ 400,000.                | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c) Total contributions    | (d)<br>Type of contribution  |
| 9          |  | \$ 375,000.                | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c) Total contributions    | (d)<br>Type of contribution  |
| 10         |  | \$\$                       | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c) Total contributions    | (d)<br>Type of contribution  |
| 11_        |  | \$ 275,000.                | Person X Payroll  Noncash  (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4  | (c) Total contributions    | (d) Type of contribution   |
| 12         |  | \$ <u>216,151.</u>         | Person X Payroll   |

Name of organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

ECONOMY

Employer identification number

94-2711707

| Part I     | Contributors (see instructions). Use duplicate copies of Part I if a | dditional space is needed. |  |
|------------|--|----------------------------|--|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                    | (c)<br>Total contributions | (d) Type of contribution   |
| 13_        |  | \$\$                       | Person X Payroll  Noncash  (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                    | (c)<br>Total contributions | (d) Type of contribution   |
|            |  | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)     |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                    | (c) Total contributions    | (d) Type of contribution   |
|            |  | \$                         | Person Payroll Noncash Complete Part II for noncash contributions.)      |
| (a)        | (b)<br>Name, address, and ZIP + 4                                    | (c) Total contributions    | (d) Type of contribution   |
| No.        | Name, address, and ZIF + 4   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)     |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                    | (c) Total contributions    | (d) Type of contribution   |
|            |  | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)     |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                    | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |  | \$                         | Person Payroll Noncash Complete Part II for noncash contributions.)      |

Name of organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

ECONOMY

Employer identification number

94-2711707

| art II Noi                   | ncash Property (see instructions). Use duplicate copies of P | art II if additional space is needed.     |                      |
|------------------------------|--|---|----------------------|
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
|                              |  | \$  |                      |
| a)<br>lo.<br>om<br>art l     | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
|                              |  | \$  |                      |
| a)<br>lo.<br>om<br>art l     | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
|                              |  | \$  |                      |
| a)<br>o.<br>om<br>ort I      | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
|                              |  | \$  |                      |
| a)<br>o.<br>om<br>rt I       | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
|                              |  | <b>\$</b>                                 |                      |
| a)<br>lo.<br>om<br>irt l     | (b)  Description of noncash property given                   | (c) FMV (or estimate) (See instructions.) | (d)<br>Date received |
| -                            |  |   |                      |
|                              |  | <b>S</b>                                  | 1                    |

**Employer identification number** 

Name of organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT 94-2711707 **ECONOMY** Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) \$ Use duplicate copies of Part III if additional space is needed. (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

### SCHEDULE C (Form 990)

# Political Campaign and Lobbying Activities

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

**2023** 

OMB No. 1545-0047

Open to Public Inspection

Department of the Treasury Internal Revenue Service Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.

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

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

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

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

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

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

 Section 501(c)(4), (5), or (6) organizations: Complete Part III. **Employer identification number** AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT 94-2711707 **ECONOMY** Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization. 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. 2 Political campaign activity expenditures Volunteer hours for political campaign activities Complete if the organization is exempt under section 501(c)(3). 1 Enter the amount of any excise tax incurred by the organization under section 4955 2 Enter the amount of any excise tax incurred by organization managers under section 4955 \_\_\_\_\_\_\$ \_\_\_\_ 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? No 4a Was a correction made? Yes Nο b If "Yes," describe in Part IV. Complete if the organization is exempt under section 501(c), except section 501(c)(3). Part I-C 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b Did the filing organization file Form 1120-POL for this year? Enter the names, addresses, and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV. (a) Name (b) Address (c) EIN (d) Amount paid from (e) Amount of political filing organization's contributions received and promptly and directly funds. If none, enter -0-. delivered to a separate political organization. If none, enter -0-.

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

|   |   | ECONOR       |               | ant under coetien                                  | 501/a\/2\ and file      |  | otion under                        |  |  |
|---|---|--------------|---------------|--|-------------------------|--|------------------------------------|--|--|
| Part  | section 501(h)).  | anizatioi    | ı is exen     | ipt under section                                  | 1 50 I (C)(S) and IIIE  | ea Form 5766 (eie                      | ction under                        |  |  |
| A Che   |   | tion belong  | s to an affil | iated group (and list in                           | Part IV each affiliated | group member's name                    | address FIN                        |  |  |
| 71 0110   | Check if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures). |              |               |  |                         |  |                                    |  |  |
| <b>B</b> Che  |   |              |               | nd "limited control" pro                           | visions annly           |  |                                    |  |  |
| <u>D</u> One  | Limi  | ts on Lobb   | ying Exper    | •  | уююно арргу.            | (a) Filing<br>organization's<br>totals | <b>(b)</b> Affiliated group totals |  |  |
| 1a Te   | otal lobbying expenditures to influ   | ience publi  | c opinion (c  | grassroots lobbying)                               |                         |  |                                    |  |  |
|   | otal lobbying expenditures to influ   | -            |               |  |                         | 267,787.                               |                                    |  |  |
|   | otal lobbying expenditures (add li  |              |               |  |                         | 267,787.                               |                                    |  |  |
|   | Other exempt purpose expenditure  |              |               |  |                         | 13,680,877.                            |                                    |  |  |
|   | otal exempt purpose expenditure   |              |               |  |                         | 13,948,664.                            |                                    |  |  |
|   | obbying nontaxable amount. Ente   |              | 847,433.      |  |                         |  |                                    |  |  |
|   | the amount on line 1e, column (a) o   |              | 7 - 7 - 7 - 7 |  |                         |  |                                    |  |  |
| If the amount on line 1e, column (a) or (b) is:  The lobbying nontaxable amount is:  not over \$500,000,  20% of the amount on line 1e. |   |              |               |  |                         |  |                                    |  |  |
| over \$500,000 but not over \$1,000,000, \$100,000 plus 15% of the excess over \$5  |   |              |               |  |                         |  |                                    |  |  |
| over \$1,000,000 but not over \$1,500,000, \$175,000 plus 10% of the excess over \$1,000,0  |   |              |               |  |                         |  |                                    |  |  |
|   | over \$1,500,000 but not over \$17,000,000, \$225,000 plus 5% of the excess over \$1,500,000.   |              |               |  |                         |  |                                    |  |  |
|   | over \$17,000,000, \$1,000,000.   |              |               |  |                         |  |                                    |  |  |
| g Grassroots nontaxable amount (enter 25% of line 1f)   |   |              |               |  |                         | 211,858.                               |                                    |  |  |
| -   | subtract line 1g from line 1a. If zer   |              | ,             |  |                         | 0.                                     |                                    |  |  |
|   | Subtract line 1f from line 1c. If zero  |              | to: 0         |  |                         | 0.                                     |                                    |  |  |
| j If  | there is an amount other than ze  | ro on either |               |  |                         |  |                                    |  |  |
|   | eporting section 4911 tax for this  |              |               |  |                         |  | Yes No                             |  |  |
|   |   |              | 4-Year Ave    | raging Period Under                                | Section 501(h)          |  |                                    |  |  |
|   | (Some organizations the   |              |               | 01(h) election do not hat ate instructions for lin | •                       | of the five columns be                 | low.                               |  |  |
|   |   | Lobb         | ying Exper    | nditures During 4-Yea                              | r Averaging Period      |  |                                    |  |  |
| (   | Calendar year<br>or fiscal year beginning in)   | <b>(a)</b> 2 | 020           | <b>(b)</b> 2021                                    | (c) 2022                | (d) 2023                               | (e) Total                          |  |  |
| <b>2</b> a L  | obbying nontaxable amount   | 609          | ,949.         | 650,645.   | 798,215.                | 847,433.                               | 2,906,242.                         |  |  |
|   | obbying ceiling amount<br>150% of line 2a, column(e))   |              |               |  |                         |  | 4,359,363.                         |  |  |
| <u>c</u> T  | otal lobbying expenditures  | 10           | ,112.         | 22,966.  | 14,144.                 | 267,787.                               | 315,009.                           |  |  |
| <b>d</b> G  | Grassroots nontaxable amount  | 152          | 487.          | 162,661.   | 199,554.                | 211,858.                               | 726,560.                           |  |  |
| <b>e</b> G  | Grassroots ceiling amount<br>150% of line 2d, column (e))   |              |               | ·  | ·                       | ,                                      | 1,089,840.                         |  |  |
|   | arassroots lobbying expenditures  |              |               |  |                         |  | •                                  |  |  |

Schedule C (Form 990) 2023

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

| 1 During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6). | 1(c)(5), or se | r section Yes 1 | mount |
|---|----------------|-----------------|-------|
| local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filling organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filling organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| or referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filling organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?  c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A  Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| g Direct contact with legislators, their staffs, government officials, or a legislative body?  h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?  b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under section 4912 d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?  | 1 2            | Yes             |       |
| b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under section 4912 d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).   | 1 2            | Yes             |       |
| c If "Yes," enter the amount of any tax incurred by organization managers under section 4912  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  eart III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  | 1 2            | Yes             |       |
| d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?  Cart III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  Were substantially all (90% or more) dues received nondeductible by members?  | 1 2            | Yes             |       |
| Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?   | 1 2            | Yes             |       |
| 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?  | 1 2            | Yes             |       |
| Were substantially all (90% or more) dues received nondeductible by members?  | 2              | 1               |       |
|   | 2              |                 | T N   |
|   | 2              |                 | +-    |
|   |                |                 | +     |
| B Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?   | r vear?   3    | 3               | +     |
| Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5),   |                |                 |       |
| 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) answered "Yes."  1 Dues, assessments and similar amounts from members  |                |                 |       |
| 2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political   |                |                 |       |
| expenses for which the section 527(f) tax was paid).  |                |                 |       |
| a Current year  |                |                 |       |
| <i>f</i>  | 2a             | <b>2</b> a      |       |
|   |                |                 |       |
|   | <u>2b</u>      | 2b              |       |
| b Carryover from last year c Total  | 2b<br>2c       | 2b<br>2c        |       |
| b Carryover from last year c Total  | 2b<br>2c<br>3  | 2b<br>2c        |       |
| b Carryover from last year c Total 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues  | 2b<br>2c<br>3  | 2b<br>2c        |       |
| <ul> <li>b Carryover from last year</li> <li>c Total</li> <li>3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues</li> <li>4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?</li> </ul>   | 2b<br>2c<br>3  | 2b<br>2c<br>3   |       |
| <ul> <li>b Carryover from last year</li> <li>c Total</li> <li>3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues</li> <li>4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?</li> <li>5 Taxable amount of lobbying and political expenditures. See instructions</li> </ul>  | 2b<br>2c<br>3  | 2b 2c 3 4       |       |
| <ul> <li>b Carryover from last year</li> <li>c Total</li> <li>3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues</li> <li>4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?</li> </ul>   | 2b<br>2c<br>3  | 2b 2c 3 4       |       |

### **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 Inspection

Name of the organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT **ECONOMY** 

**Employer identification number** 94-2711707

| Pa  | organizations Maintaining Donor Advised organization answered "Yes" on Form 990, Part IV, line |   | ar Funds or Ad       | Counts. Complete if the         |
|-----|--|---|----------------------|---------------------------------|
|     |  | (a) Donor advised fund                  | ds                   | (b) Funds and other accounts    |
| 1   | Total number at end of year  |   |                      |                                 |
| 2   | Aggregate value of contributions to (during year)  |   |                      |                                 |
| 3   | Aggregate value of grants from (during year)   |   |                      |                                 |
| 4   | Aggregate value at end of year   |   |                      |                                 |
| 5   | Did the organization inform all donors and donor advisors in w                                 | riting that the assets held in c        | donor advised fund   | ds                              |
|     | are the organization's property, subject to the organization's e                               | exclusive legal control?                |                      | Yes No                          |
| 6   | Did the organization inform all grantees, donors, and donor ac                                 |   |                      |                                 |
|     | for charitable purposes and not for the benefit of the donor or                                |   |                      |                                 |
|     | impermissible private benefit?   |   |                      | Yes No                          |
| Pai |  |   |                      |                                 |
| 1   | Purpose(s) of conservation easements held by the organization                                  | n (check all that apply).               |                      |                                 |
|     | Preservation of land for public use (for example, recreat                                      |   | servation of a histo | orically important land area    |
|     | Protection of natural habitat  | · —                                     |                      | ified historic structure        |
|     | Preservation of open space   |   |                      |                                 |
| 2   | Complete lines 2a through 2d if the organization held a qualification                          | ed conservation contribution i          | n the form of a co   | nservation easement on the last |
|     | day of the tax year.   |   |                      | Held at the End of the Tax Year |
| а   |  |   |                      | 2a                              |
| b   | <b>-</b>   |   |                      | 2b                              |
| c   | Number of conservation easements on a certified historic stru                                  |   |                      | 2c                              |
|     | Number of conservation easements included on line 2c acquir                                    | •••                                     |                      |                                 |
| -   | on a historic structure listed in the National Register  | • • •                                   |                      | 2d                              |
| 3   | Number of conservation easements modified, transferred, rele                                   |   |                      |                                 |
| Ü   | year   | asca, extinguished, or termin           | ated by the organi   | zation during the tax           |
| 4   | Number of states where property subject to conservation ease                                   | ament is located                        |                      |                                 |
| 5   | Does the organization have a written policy regarding the peri                                 |   | andling of           |                                 |
| 3   | violations, and enforcement of the conservation easements it                                   | • | •                    | Yes No                          |
| 6   | Staff and volunteer hours devoted to monitoring, inspecting, h                                 |   |                      |                                 |
| Ū   | etan and volunteen neare develous to membering, mepeeting, r                                   | arraining of Violationic, and orni      | oromig comportation  | on eacomonic daring the year    |
| 7   | Amount of expenses incurred in monitoring, inspecting, handl                                   | ing of violations, and enforcing        | a conservation ea    | sements during the year         |
| -   | , under the expenses meaned in monitoring, indposting, marian                                  | ing of violations, and officions        | g concervation ca    | comente dannig the year         |
| 8   | Does each conservation easement reported on line 2d above                                      | satisfy the requirements of se          | ction 170(h)(4)(B)(i | )                               |
| _   | and section 170(h)(4)(B)(ii)?  | · ·                                     |                      | · — —                           |
| 9   | In Part XIII, describe how the organization reports conservatio                                |   |                      |                                 |
| ·   | balance sheet, and include, if applicable, the text of the footnote                            |   | •                    |                                 |
|     | organization's accounting for conservation easements.  | oto to the organization o infant        |                      |                                 |
| Pai | t III Organizations Maintaining Collections of   | Art, Historical Treasur                 | es, or Other S       | Similar Assets.                 |
|     | Complete if the organization answered "Yes" on Form  |   | •                    |                                 |
|     | If the organization elected, as permitted under FASB ASC 958                                   |   | statement and hala   | ance sheet works                |
|     | of art, historical treasures, or other similar assets held for public                          | , .                                     |                      |                                 |
|     | service, provide in Part XIII the text of the footnote to its finance                          |   |                      | ice of public                   |
| b   | If the organization elected, as permitted under FASB ASC 958                                   |   |                      | sheet works of                  |
| -   | art, historical treasures, or other similar assets held for public                             |   |                      |                                 |
|     | provide the following amounts relating to these items.   | exhibition, education, or resea         |                      | or public service,              |
|     |  |   |                      | <b>¢</b>                        |
|     | (i) Revenue included on Form 990, Part VIII, line 1  |   |                      |                                 |
| 2   | If the organization received or held works of art, historical trea                             | curse or other similar assets           |                      |                                 |
| 2   |  |   |                      | provide                         |
| _   | the following amounts required to be reported under FASB AS                                    |   |                      | <b>c</b>                        |
|     | Revenue included on Form 990, Part VIII, line 1  |   |                      |                                 |
|     | Assets included in Form 990, Part X  |   |                      |                                 |
| LHA | For Paperwork Reduction Act Notice, see the Instructions                                       | IUI FUIIII 99U.                         |                      | Schedule D (Form 990) 2023      |

332051 09-28-23

|      | Description of property | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|------|-------------------------|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a   | Land                    |                                      |                                 |                              |                |
| b    | Buildings               |                                      |                                 |                              |                |
| С    | Leasehold improvements  |                                      | 781,664.                        | 198,956.                     | 582,708.       |
|      | Equipment               |                                      |                                 |                              |                |
| е    | Other                   |                                      | 558,340.                        | 293,034.                     | 265,306.       |
| Tota | 848,014.                |                                      |                                 |                              |                |

| Part VII Investments - Other Securities                              |                            |   | i-Z/II/U/ Page ∙       |
|--|----------------------------|---|------------------------|
| Complete if the organization answered "Yes" of                       | 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 en       | d-of-year market value |
| 1) Financial derivatives   |                            |   |                        |
| 2) Closely held equity interests                                     |                            |   |                        |
| 3) Other   |                            |   |                        |
| (A)  |                            |   |                        |
| (B)  |                            |   |                        |
| (C)  |                            |   |                        |
| (D)  |                            |   |                        |
| (E)  |                            |   |                        |
| (F)  |                            |   |                        |
| (G)  |                            |   |                        |
| (H)  |                            |   |                        |
| otal. (Col. (b) must equal Form 990, Part X, line 12, col. (B))      |                            |   |                        |
| Part VIII Investments - Program Related.                             |                            |   |                        |
| Complete if the organization answered "Yes" of                       |                            |   |                        |
| (a) Description of investment  | (b) Book value             | (c) Method of valuation: Cost or en       | d-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" of                       |                            | e 11d. See Form 990, Part X, line 15.     |                        |
| <u>``</u>  | Description                |   | (b) Book value         |
| (1) SECURITY DEPOSIT   |                            |   | 37,754                 |
| (2) OPERATING RIGHT-OF-USE ASS                                       | ET                         |   | 4,854,240              |
| (3)  |                            |   |                        |
| (4)  |                            |   |                        |
| (5)  |                            |   |                        |
| (6)  |                            |   |                        |
| (7)  |                            |   |                        |
| (8)  |                            |   |                        |
| (9)  |                            |   | 4 001 004              |
| Total. (Column (b) must equal Form 990, Part X, line 15, col.        | (B))                       |   | 4,891,994              |
| Part X Other Liabilities   |                            |   |                        |
| Complete if the organization answered "Yes" of                       | on Form 990, Part IV, line | 11e or 11f. See Form 990, Part X, line 25 |                        |
| (a) Description of liability   |                            |   | (b) Book value         |
| (1) Federal income taxes   |                            |   | 6 260 400              |
| (2) OPERATING LEASE LIABILITY  |                            |   | 6,369,483              |
| (3)  |                            |   | -                      |
| (4)  |                            |   |                        |
| (5)  |                            |   |                        |
| (6)  |                            |   |                        |
| (7)  |                            |   |                        |
| (8)  |                            |   |                        |
|  |                            |   | 1                      |
| (9)  Fotal. (Column (b) must equal Form 990, Part X, line 25, col.   |                            |   | 6,369,483              |

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

# SCHEDULE F (Form 990)

# **Statement of Activities Outside the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

Attach to Form 990.

2023
Open to Public Inspection

Department of the Treasury Internal Revenue Service

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

Name of the organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT

ECONOMY

**Employer identification number** 

94-2711707

| Pai | Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" on                  |   |   |   |  |  |  |  |  |  |
|-----|---|---|---|---|--|--|--|--|--|--|
|     | Form 990, Part IV, line 14b.  |   |   |   |  |  |  |  |  |  |
| 1   |   |   |   |   |  |  |  |  |  |  |
|     | the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes X No |   |   |   |  |  |  |  |  |  |
|     |   |   |   |   |  |  |  |  |  |  |
| 2   | For grantmakers. Desc   | ribe in Part V the  | organization's  | procedures for monitoring the use of its  | grants and other assistance outsi  | de the   |  |  |  |  |
|     | United States.  |   |   |   |  |  |  |  |  |  |
| _3_ | Activities per Region. (Th  | ne following Part I, line 3 table can be duplicated if additional space is needed.) |   |   |  |  |  |  |  |  |
|     | (a) Region  | (b) Number of offices in the region   | (c) Number of<br>employees,<br>agents, and<br>independent<br>contractors<br>in the region | (d) Activities conducted in the region<br>(by type) (such as, fundraising, pro-<br>gram services, investments, grants to<br>recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in the region | (f) Total<br>expenditures<br>for and<br>investments<br>in the region |  |  |  |  |
|     |   |   |   |   |  |  |  |  |  |  |
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| 3 a | Subtotal  | 0   | 0   |   |  | 0.   |  |  |  |  |
|     | Total from continuation   |   |   |   |  |  |  |  |  |  |
|     | sheets to Part I  | 0   | 0   |   |  | 0.   |  |  |  |  |
| С   | Totals (add lines 3a  |   |   |   |  |  |  |  |  |  |
|     | and 3b)   | 0   | 0   |   |  | 0.   |  |  |  |  |

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

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

| 1<br>(a) Name of organization | (b) IRS code section and EIN (if applicable) |            | (d) Purpose of grant  | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of<br>noncash<br>assistance | (h) Description<br>of noncash<br>assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|-------------------------------|--|------------|---|--------------------------|---------------------------------|--|---|---|
|                               |  |            | SUPPORT FOR CAPACITY BUILDING AND ECOSYSTEM DEVELOPMENT TOWARD NET ZERO | 200 000                  |                                 | 0                                      |   |   |
|                               |  | SOUTH ASIA | TOWARD NET ZERO   | 290,000.                 |                                 | 0.                                     |   |   |
|                               |  |            |   |                          |                                 |  |   |   |
|                               |  |            |   |                          |                                 |  |   |   |
|                               |  |            |   |                          |                                 |  |   |   |
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|                               |  |            |   |                          |                                 |  |   |   |
|                               |  |            |   |                          |                                 |  |   |   |
| O Fratau tatal mumah au af    |  |            | recognized as charities by the  |                          |                                 | •                                      | •   | •   |

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

3 Enter total number of other organizations or entities

| Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 16.  Part III can be duplicated if additional space is needed. |            |                          |                          |                                 |                                  |                                       |  |
|---|------------|--------------------------|--------------------------|---------------------------------|----------------------------------|---------------------------------------|--|
| Part III can be duplicated if a   | (b) Region | (c) Number of recipients | (d) Amount of cash grant | (e) Manner of cash disbursement | (f) Amount of noncash assistance | (g) Description of noncash assistance | (h) Method of<br>valuation<br>(book, FMV,<br>appraisal, other) |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |
|   |            |                          |                          |                                 |                                  |                                       |  |

Page 4

| Part | IV Foreign Forms  |     |      |
|------|---|-----|------|
| 1    | Was the organization a U.S. transferor of property to a foreign corporation during the tax year? <i>If</i> "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see the Instructions for Form 926)   | Yes | X No |
| 2    | Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see the Instructions for Forms 3520 and 3520-A; don't file with Form 990) | Yes | X No |
| 3    | Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see the Instructions for Form 5471)  | Yes | X No |
| 4    | Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see the Instructions for Form 8621)   | Yes | X No |
| 5    | Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes."   |     |      |

the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain

Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see

Foreign Partnerships (see the Instructions for Form 8865)

the Instructions for Form 5713; don't file with Form 990)

Schedule F (Form 990) 2023

Yes X No

Yes X No

6

| Provide the information  Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions. |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|
| PART II, COLUMN (D):   |  |  |  |  |  |  |  |  |
| REGION: SOUTH ASIA   |  |  |  |  |  |  |  |  |
| (D) PURPOSE OF GRANT: SUPPORT FOR CAPACITY BUILDING AND ECOSYSTEM  |  |  |  |  |  |  |  |  |
| DEVELOPMENT TOWARD NET ZERO ENERGY BUILDINGS IN INDIA  |  |  |  |  |  |  |  |  |
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## SCHEDULE J (Form 990)

Department of the Treasury

**Compensation Information** 

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

Attach to Form 990.

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

**ZUZ**3

OMB No. 1545-0047

Open to Public Inspection

Internal Revenue Service Name of the organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT ECONOMY

Employer identification number 94-2711707

| Pa | art I Questions Regarding Compensation   |    |     |          |  |  |  |  |  |
|----|--|----|-----|----------|--|--|--|--|--|
|    |  |    | Yes | No       |  |  |  |  |  |
| 1a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, |    |     |          |  |  |  |  |  |
|    | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.             |    |     |          |  |  |  |  |  |
|    | First-class or charter travel Housing allowance or residence for personal use  |    |     |          |  |  |  |  |  |
|    | Travel for companions Payments for business use of personal residence  |    |     |          |  |  |  |  |  |
|    | Tax indemnification and gross-up payments  Health or social club dues or initiation fees                               |    |     |          |  |  |  |  |  |
|    | Discretionary spending account Personal services (such as maid, chauffeur, chef)                                       |    |     |          |  |  |  |  |  |
|    |  |    |     |          |  |  |  |  |  |
| b  | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or          |    |     |          |  |  |  |  |  |
|    | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain               | 1b |     |          |  |  |  |  |  |
| 2  | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,       | 2  |     |          |  |  |  |  |  |
|    | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?                  |    |     |          |  |  |  |  |  |
|    |  |    |     |          |  |  |  |  |  |
| 3  | Indicate which, if any, of the following the organization used to establish the compensation of the organization's     |    |     |          |  |  |  |  |  |
|    | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to     |    |     |          |  |  |  |  |  |
|    | establish compensation of the CEO/Executive Director, but explain in Part III.   |    |     |          |  |  |  |  |  |
|    | X Compensation committee Written employment contract   |    |     |          |  |  |  |  |  |
|    | X Independent compensation consultant X Compensation survey or study   |    |     |          |  |  |  |  |  |
|    | X Form 990 of other organizations X Approval by the board or compensation committee                                    |    |     |          |  |  |  |  |  |
| 4  | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing           |    |     |          |  |  |  |  |  |
| 7  | organization or a related organization:  |    |     |          |  |  |  |  |  |
| a  | Receive a severance payment or change-of-control payment?  | 4a |     | х        |  |  |  |  |  |
| h  | Participate in or receive payment from a supplemental nonqualified retirement plan?                                    | 4b |     | X        |  |  |  |  |  |
| c  | Participate in or receive payment from an equity-based compensation arrangement?                                       | 4c |     | х        |  |  |  |  |  |
| _  | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.          |    |     |          |  |  |  |  |  |
|    |  |    |     |          |  |  |  |  |  |
|    | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.                               |    |     |          |  |  |  |  |  |
| 5  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |          |  |  |  |  |  |
|    | contingent on the revenues of:   |    |     |          |  |  |  |  |  |
| а  | The organization?  | 5a |     | X        |  |  |  |  |  |
| b  | Any related organization?  | 5b |     | Х        |  |  |  |  |  |
|    | If "Yes" on line 5a or 5b, describe in Part III.   |    |     |          |  |  |  |  |  |
| 6  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation      |    |     |          |  |  |  |  |  |
|    | contingent on the net earnings of:   |    |     |          |  |  |  |  |  |
| а  | The organization?  | 6a |     | X        |  |  |  |  |  |
| b  | Any related organization?  | 6b |     | Х        |  |  |  |  |  |
|    | If "Yes" on line 6a or 6b, describe in Part III.   |    |     |          |  |  |  |  |  |
| 7  | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments       |    |     | 37       |  |  |  |  |  |
| _  | not described on lines 5 and 6? If "Yes," describe in Part III   | 7  |     | X        |  |  |  |  |  |
| 8  | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the        |    |     | v        |  |  |  |  |  |
| •  | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III            | 8  |     | X        |  |  |  |  |  |
| 9  | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in                 |    |     |          |  |  |  |  |  |
|    | Regulations section 53.4958-6(c)?  | 9  |     | <u> </u> |  |  |  |  |  |

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

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

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

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

|   |      | <b>(B)</b> Breakdown of W | /-2 and/or 1099-MIS0 compensation   | C and/or 1099-NEC                   | (C) Retirement and other deferred | (D) Nontaxable benefits | (E) Total of columns<br>(B)(i)-(D) | (F) Compensation in column (B)            |  |
|---|------|---------------------------|-------------------------------------|-------------------------------------|-----------------------------------|-------------------------|------------------------------------|---|--|
| (A) Name and Title  |      | (i) Base compensation     | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | compensation                      |                         |                                    | reported as deferred<br>on prior Form 990 |  |
| (1) STEVE NADEL   | (i)  | 324,774.                  | 0.                                  | 4,038.                              | 14,310.                           | 24,107.                 | 367,229.                           | 0.  |  |
|   | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (2) NAOMI BAUM  | (i)  | 256,943.                  | 0.                                  | 2,664.                              | 15,348.                           | 3,400.                  | 278,355.                           | 0.  |  |
|   | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (3) CAMRON S ASSADI   | (i)  | 171,050.                  | 0.                                  | 1,541.                              | 9,713.                            | 26,901.                 | 209,205.                           | 0.  |  |
|   | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (4) NORA ESRAM  | (i)  | 170,768.                  | 0.                                  | 1,290.                              | 10,681.                           | 22,136.                 | 204,875.                           | 0.  |  |
|   | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (5) THOMAS COX  | (i)  | 169,072.                  | 0.                                  | 1,864.                              | 10,169.                           | 12,334.                 | 193,439.                           | 0.  |  |
|   | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (6) CORINNE ABBOTT  | (i)  | 174,828.                  | 0.                                  | 2,464.                              | 10,453.                           | 2,864.                  | 190,609.                           | 0.  |  |
| l de la companya de | ii)  | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (7) ANDREW DELASKI  | (i)  | 166,318.                  | 0.                                  | 1,802.                              | 9,871.                            | 1,200.                  | 179,191.                           | 0.  |  |
| l de la companya de | (ii) | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
| (8) LOWELL UNGAR  | (i)  | 142,890.                  | 0.                                  | 1,895.                              | 8,694.                            | 16,394.                 | 169,873.                           | 0.  |  |
| DIRECTOR OF FEDERAL POLICY  | ii)  | 0.                        | 0.                                  | 0.                                  | 0.                                | 0.                      | 0.                                 | 0.  |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | (i)  |                           |                                     |                                     |                                   |                         |                                    |   |  |
|   | ii)  |                           |                                     |                                     |                                   |                         |                                    |   |  |

| Part III Supplemental Information  |
|--|
| ovide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
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### 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.

2023
Open to Public Inspection

OMB No. 1545-0047

Name of the organization

AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT ECONOMY

Employer identification number 94-2711707

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

ANALYSIS ADVANCES INVESTMENTS, PROGRAMS, AND BEHAVIORS THAT USE ENERGY

MORE EFFICIENTLY AND HELP BUILD AN EQUITABLE CLEAN ENERGY FUTURE.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: PROMOTES THE HEALTH, SAFETY AND WELLBEING OF ALL.

FORM 990, PART VI, SECTION A, LINE 1A:

THE MEMBERS OF THE EXECUTIVE COMMITTEE SHALL BE THE CHAIRMAN OF THE BOARD,
THE PRESIDENT, THE SECRETARY, AND THE TREASURER OF THIS CORPORATION. THE
BOARD MAY APPOINT ADDITIONAL DIRECTORS TO BE MEMBERS OF THE EXECUTIVE

COMMITTEE. THE EXECUTIVE COMMITTEE SHALL PROVIDE OVERSIGHT AND ADVISE THE

EXECUTIVE DIRECTOR ON LONG-TERM ISSUES THAT NEED DECISIONS BETWEEN THE

BOARD MEETINGS SUCH AS MAJOR UNDERTAKINGS, MAJOR STAFFING CHANGES, AND

CONTROVERSIAL ISSUES IN ORGANIZATIONAL CONDUCT AND SHALL TAKE SUCH OTHER

ACTIONS AS MAY BE NECESSARY FOR THE PROPER SUPERVISION OF THE CORPORATION'S

AFFAIRS WHEN THE BOARD IS NOT IN SESSION. THE EXECUTIVE COMMITTEE SHALL

HAVE ALL THE AUTHORITY OF THE BOARD, EXCEPT THAT THE EXECUTIVE COMMITTEE,

REGARDLESS OF BOARD RESOLUTION, MAY NOT:

- A) FILL VACANCIES ON THE BOARD OF DIRECTORS OR ON ANY COMMITTEE;
- B) FIX COMPENSATION OF DIRECTORS FOR SERVING ON THE BOARD OF ANY COMMITTEE;
- C) DISSOLVE THE CORPORATION;
- D) AMEND OR REPEAL BY-LAWS OR ADOPT NEW BY-LAWS;
- E) AMEND OR REPEAL ANY RESOLUTION OF THE BOARD OF DIRECTORS OR OF ANY OTHER COMMITTEE;

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

Schedule O (Form 990) 2023 Page 2

Name of the organization AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT ECONOMY

Employer identification number 94-2711707

- F) APPOINT ANY OTHER COMMITTEES OF THE BOARD OF DIRECTORS OR THE MEMBERS
  THEROF;
- G) SPEND CORPORATE FUNDS TO SUPPORT A NOMINEE FOR DIRECTORS AFTER THERE ARE

  MORE PEOPLE NOMINATED FOR DIRECTOR THAN CAN BE ELECTED;
- H) APPROVE ANY TRANSACTION BETWEEN THIS CORPORATION AND ONE OR MORE OF ITS

  DIRECTORS IN WHICH THE DIRECTOR OR DIRECTORS HAVE A MATERIAL FINANCIAL

  INTEREST, EXCEPT AS PROVIDED IN SECTION 5233 (D) (3) OF THE CALIFORNIA

  CORPORATIONS CODE; OR
- I) APPROVE ANY ACTION THAT, UNDER THE CALIFORNIA NONPROFIT CORPORATION LAW,

  ALSO REQUIRES THE AFFIRMATIVE VOTE OF THE MEMBERS OF A PUBLIC BENEFIT

  CORPORATION, REGARDLESS OF WHETHER THIS CORPORATION HAS MEMBERS.

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

THE FORM 990 WAS REVIEWED BY THE EXECUTIVE DIRECTOR, THE CHIEF OPERATING

OFFICER, AND THE DIRECTOR OF FINANCE. THE FORM 990 WAS THEN CIRCULATED TO

THE BOARD PRIOR TO FILING.

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

MANAGEMENT DISTRIBUTES THE CONFLICT OF INTEREST POLICY IN THE EMPLOYEE

HANDBOOK TO ALL NEW EMPLOYEES UPON HIRE. THE HUMAN RESOURCES DEPARTMENT

REITERATES THIS POLICY AT APPROPRIATE TIMES THROUGHOUT THE YEAR, EITHER IN

STAFF MEETINGS OR IN ONE-ON-ONE INTERACTIONS. ALL EMPLOYEES ARE SUBJECT TO

THIS POLICY. IF IT IS DETERMINED THAT A MATERIAL CONFLICT EXISTS THE

EMPLOYEE MUST RESCUE HIMSELF FROM THE MATTER.

DURING BOARD MEETINGS THE CHIEF OPERATING OFFICER WILL DRAW ATTENTION TO

AND REMIND THE BOARD ABOUT THE CONFLICT OF INTEREST POLICY. BOARD MEMBERS

ARE REQUIRED TO AFFIRM THEIR COMPLIANCE WITH THE CONFLICT OF INTEREST

Schedule O (Form 990) 2023 Page **2** 

Name of the organization AMERICAN COUNCIL FOR AN ENERGY-EFFICIENT ECONOMY Employer identification number 94-2711707

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

THE COMPENSATION COMMITTEE OF THE BOARD OF DIRECTORS ESTABLISHES AND

APPROVES THE COMPENSATION OF THE EXECUTIVE DIRECTOR AND THE CHIEF OPERATING

OFFICER. AS WELL AS REVIEWS AND APPROVES THEIR RECOMMENDATION ON STAFF

SALARIES. THESE ARE ALSO REVIEWED AND APPROVED BY THE FULL BOARD. THIS

REVIEW WAS LAST PERFORMED IN JANUARY OF 2023. COMPARABILITY DATA, COLLECTED

EVERY THREE YEARS, IS USED TO HELP DETERMINE PAY. A COMPENSATION CONSULTANT

CONDUCTED A COMPREHENSIVE BENCHMARKING OF STAFF SALARIES AND A SURVEY OF

PEERS IN 2023, AND THE NEXT TO BE PERFORMED IN 2025.

FORM 990, PART VI, SECTION C, LINE 18:

VIA HYPERTEXT LINK

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

THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST
POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

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

CONSULTANTS:

PROGRAM SERVICE EXPENSES

MANAGEMENT AND GENERAL EXPENSES

1,884,673.

155,413.

FUNDRAISING EXPENSES

6,287.

TOTAL EXPENSES

2,046,373.

TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A

2,046,373.

FORM 990, PART XII, LINE 2C:

DURING THE TAX YEAR, ACEEE DID NOT CHANGE ITS PROCESSES FOR OVERSIGHT

| SCH | eaule O ( | FOIIII 990) 2 | <u> </u> |                 |     |     |     |       |        |     |             | Page 2                                    |
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| Nan | ne of the | organizatior  | n AM     | ERICAN<br>ONOMY | COU | NCI | L F | OR AN | ENERG  | ₹Y- | -EFFICIENT  | Employer identification number 94-2711707 |
| OF  | THE       | AUDIT         | AND      | SELECT          | ION | OF  | AN  | INDE  | PENDEN | ΙΤ  | ACCOUNTANT. |   |
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